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**Intra-EU labour mobility and convergence in the EU  
The contradictory nature of the neoclassical aims of the EU**

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# Intra-EU labour mobility and convergence in the EU: The contradictory nature of the neoclassical aims of the EU

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## Abstract

One of the common debates in the European Union revolves around the argument that labour mobility in the EU is too low and well below the general expectations. Since the implementation of neoliberal policies in the 1980s, the EU has increasingly favoured 'high labour mobility levels within the EU' and has desperately been trying to increase them ever since. In particular, in the last decade the EU has implemented various programmes in order to boost labour mobility between the member states.

This thesis challenges the current view of EU institutions with their call for higher mobility levels between the EU member states. According to migration theories (the neoclassical theory of migration), individuals move in order to profit from economic advantages, i.e. they move to regions with better prospects of earning higher wages. In other words, under this lens migration takes places between economically different regions. In addition, the EU has been trying to achieve convergence between the regions by implementing cohesion policies, which means the reduction of economic disparities between regions.

Through semi-structured interviews, the motivations of EU-migrants between converged and non-converged regions are explored and compared. The outcomes of this research study bring into question the perspective of the EU institutions by providing evidence that high mobility levels cannot be achieved in converged regions as both ambitions correlate from the same source, namely wage differentials. The EU is thus following paradoxical aims.

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"Rerum cognoscere causas."

"To know the causes of things."

Virgil's Georgics

Upon these thoughts it was, when this long journey began.

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## Abbreviations

EU	European Union
UK	United Kingdom
SEA	Single European Act
ECSC	European Coal and Steel Community
EC	European Community
SEM	Single European Market
OCA	Optimum Currency Area
EMU	European Monetary Union
NELM	The New Economics of Labour Migration
PPP	Purchasing Power Parity
UN	United Nations
ONS	Office for National Statistics
IPS	International Passenger Survey
EFTA	European Free Trade Association
WRS	Workers Registration Scheme
NINos	National Insurance Numbers
LFS	Labour Force Survey
ILO	International Labour Organisation

## Introduction

The 1980s were marked by a change in the political course regarding the European integration process from Keynesian to neoliberal policy making. Together with the introduction of the neoliberal policy agenda and the creation of the Single European Market (SEM), labour mobility gained in importance and this led to the revival of the integration process. Since then, increased or high mobility levels have been associated with economic superiority and hence, have become one of the main objectives of the European Union (EU).<sup>1</sup> In parallel, a further aim on the neoliberal policy agenda was convergence through cohesion policies as part of the integration process. This PhD research involves critically scrutinising the neoliberal approaches of the EU as part of the economic integration process and interrogates their compatibility, i.e. in integrated economies, are increased labour mobility levels compatible with convergence? According to the neoclassical theory of migration, labour migrants move as a consequence of wage differentials, which help in making a reality what the EU institutions<sup>2</sup> are aiming at, namely, reducing economic disparities. This thesis investigates the appropriateness of the neoliberal EU perspective on migration by testing the neoclassical theory on EU labour migrants. The empirical research comprises semi-structured interviews with labour migrants who came to the UK from other EU member states with different economic backgrounds. Considering the economic background of their country of origin, the aim is to define the determinants of the various migration corridors within the EU. If the prevailing motivation behind the bigger migration streams is based on wage differentials and if these are lacking between converged regions, then the neoliberal aims are at odds with the reality. That is, if the motivators of the neoclassical theory of migration are only applicable in non-converged regions, then the EU goal of convergence through social cohesion is unlikely to be achieved. The final aim of the research is to provide an explanation for the low mobility levels in Europe from a new perspective, in a way that is distinct to the conventional approaches in the current literature. Whilst the EU is trying to increase intra-EU mobility levels between converged regions as they consider them to be too low, the aim is to demonstrate through qualitative data that this is a very difficult task, because

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<sup>1</sup> From now onwards, the term EU will refer to the previous forms of the EU, i.d. EC, EEC, etc.

<sup>2</sup> EU Institutions, such as e.g. the EU Commission.

according to the classical theory of migration, the current situation is in line the macroeconomic givens. That is, under this theory, converged regions would not expect to experience as high mobility as converging ones, because big wage differentials are absent.

### **The EU integration process and internal labour mobility**

In the 1980s, the European Union underwent a thorough renewal regarding the policy agenda and labour mobility became one of the central features in the European integration process. As a result of the oil crisis, the European economy was experiencing economic stagnation (Bache & George, p. 407, 2006), affecting the integration process in a negative way. This particular period became later known as that of 'Eurosclerosis'. Despite the underlying idea behind integration being to achieve a competitive Union with a globally powerful economy having always been one of the fundamental aims of the EU, the 1970s were marked by only low level of integrationist impulses. At the same time, the global economy was changing dynamically and international competition grew immensely. The need for member states to compete in world markets, especially against the United States and Japan, became increasingly an overriding concern (e.g. George & Bache, 2006 or Molle, 1994). Consequently, there was a growing consensus among political and business leaders that a new strategy was necessary, which eventually led to pressure being applied for the creation of a single market.

The Keynesian economic policy proved to be insufficient in competing with the fast changing global economic environment and therefore, there was a change of course to a market-driven, neoliberal policy agenda, with a 'genuine common market in goods and services, and the promotion of a radically neo-liberal agenda' (Cini, 2003, p. 35). On the basis of these ideas, the proposed treaty reforms were brought together under what was to become the Single European Act (SEA). The aim was to regain economic power and this marked an entirely new phase in the European integration process. Championed under the Commission of Jacques Delors in 1985, the SEA of 1986 was the first major revision to the Treaty of Rome of 1957. The core of the SEA consisted of the preeminent four 'freedoms': the free movement of goods, free movement of services, free movement of labour, and the free movement of capital. Regarding the free movement for workers, the original concept was established for

the first time together with the birth of the EU and the Treaty of Rome in 1957, but was not realised until the 1980s. According to the theories of economic integration, free movement of workers is considered as one of the main components for an effectively working and economically powerful single market (Molle, 1994; Swann, 2000). Thanks to the new neoliberal market policy agenda, the concept of the free movement of workers, or in other words labour mobility, thus regained economic significance and from then on became a fundamental ingredient of a powerful European Union.

‘Competitiveness’ constitutes a crucial element of economic integration and has been one of primary aims of EU politics since the beginning. The basic idea of the process of integration was set in motion when the European Coal and Steel Community (ECSC) was decided upon in Paris 1951, as the forerunner to the European Community (EC) established in the Treaty of Rome in 1957. Since then, the European Union has been founded on the notion of being a well-harmonised entity with the ultimate aim of creating a stable, sustainable and globally competitive economic environment. Economic integration and sustained peace for the EU regions became a priority after World War II, particularly in the core continental regional economies in Europe that had suffered total devastation of their economies. The French political economist, Jean Monnet, who is regarded today as one of the founding fathers of the European Union, realised that a permanent form of peace and stability between the historic rivals Germany and France would only be achieved through the integration of their economies. Not only was the achievement of permanent peace a major concern, the integration of the economies would mean increased productivity of the member states, which would re-strengthen their economies. Firmly convinced that economic development and prosperity could be best achieved at a European rather than on a national level, Monnet proposed that France and Germany should form the core of the integrative venture. Following his suggestion, first, came the establishment of the abovementioned ECSC in 1951, hailed by him as the “first expression of the Europe that is being born” (Cini, p. 17, 2003), which would be Europe’s first organisation that involved the yielding of a degree of state sovereignty to a supranational authority (Diebold, 1959). Schumann, then French Foreign Minister, who eagerly subscribed to Monnet’s view, drafted and provided the blueprint for the ECSC, also known as the Schumann Plan. This was

overtly about more than just coal and steel, for as Schuman emphasised, it would set down a “common basis for economic development” (Cini, p. 17, 2003), with the free movement of workers being a vital element. Despite labour mobility having always been considered important as part of the integration process, it was not until the creation of Single European Market in the 1980s that it really became prominent in the Union discourse.

### **Labour mobility or high mobility levels as an aim of the EU**

At this point, it is useful to discuss the two notions ‘movement of labour’ and ‘high mobility levels’. The literature on European Integration specifically emphasises the promotion of ‘free movement’. As Laffan (2000) put it, “for labour, the provisions for free movement meant the abolition of restrictions on labour mobility, allowing workers to get jobs anywhere in the EC” (p. 25). However, it could be argued that the ‘free movement of labour’ as a final objective might not necessarily entail the desire ‘to aim for high mobility levels of workers’. That is, it could simply denote free movement in the form of a fundamental right; a precondition that is not linked to the idea of high mobility levels.

Despite Molle (1994) asserting that “massive migration flows were never an objective of the EU” (p. 482,), during the years right after the introduction of the SEM, the issue of the ‘lack of mobility of EU citizens’ started to become an increasingly serious concern and later, even turned into a major worry, with the absence of high mobility of workers in the EU being regarded as “more than ever an obstacle” (Broyer et al., 2011). Consequently, the Commission decided to combat the low mobility levels by introducing various strategies, such as the Job Mobility Action Plan of 2007 – 2010. In addition, in recent years, an abundance of studies has emerged, which have focused on the removal of the ‘barriers’ to mobility levels, which again underlines how low levels are considered by many as being detrimental. In sum, the Commission’s reaction to the barriers as well as the plentiful literature on these demonstrate that low mobility levels are seen as a problem in the European Union and that ‘high levels of mobility’ are desirable, because they serve an important macroeconomic function, not just the existence of the basic right to move.

Researchers on migration have developed a wide spectrum of theoretical approaches in order to explain the origins, patterns, and characteristics of migration flows. In the main, the literature discusses the various determinants for migrants to move, with the most conventional and influential approaches in the decision-making process to migrate being with regards to economic motivations or social reasons or a combination of these. One of the principle lenses is the neoclassical theory (Ranis and Fei, 1961; Harris and Todaro, 1970; Todaro, 1969), the proponents of which state that the decision to migrate is affected by income maximisation, wealth differentials as well as differences in employment opportunities as important pull factors. Sjaastad (1962) extended the neoclassical theory by adding a microeconomic dimension, whereby individuals as rational actors decide to migrate by undertaking a cost-benefits analysis to estimate their utility maximisation, and this became known as the Human Capital Theory. Another migration theory that involves both economic as well as social factors is the New Economics of Labour Migration theory (NELM), which considers both social and family networks as well as wage calculations, such as risk assessment and migration decisions. (Borjas, 1989; Massey et al., 1993 and 1998, Bauer and Zimmermann, 1995). Other migration theories deal with non-economic determinants, only focusing on social factors, like e.g. accessibility and the vitality of the social networks in the destination country (Massey et al., 1993; Massey et al., 1994; Hatton and Williamson, 2002), one of which is the network theory. Under this optic, social networks are seen as creating the transferability of social capital to incoming migrants and thus, yielding a better circulation of the necessary information than in their absence, which as a result fosters mobility (Massey et al., 1994). The general social systems theory, put forward by Nowotny-Hoffmann (1970 & 1973), focuses on the role of prestige, social status and power as determinants.

A review of the research studies on intra-EU migration leads to the conclusion that high levels of labour migration in the EU have predominantly occurred due to wage differentials, as put forward in the neoclassical theory. Immediately after the enlargement of 2004, the UK received massive flows of migrants from the Eastern European countries, especially Poland, who came to accept jobs that were well



below their skills levels.<sup>3</sup> Hence, it would appear to be inappropriate to argue that mobility levels in the EU are consistently low, given that some countries have received large influxes of migrants from specific nations in recent years. It could be the case that these levels are only low between countries that have converged.

### **Economic convergence and labour mobility: An impossible coupling?**

Throughout the stages of EU integration, the policy makers came together several times and developed various strategic plans in order to boost the economic integration process, where convergence and labour mobility played a major role in their policy agenda. Later, as a result of the economic crisis in the 1970s, the EU changed course from a Keynesian to a neoliberal market-driven economy and with it, labour mobility gained more significance than previously.

Next to increased labour mobility levels and the removal of the barriers, a further channel on the agenda of the SEA and the neoliberal aims to increase competitiveness in the European Union, is the promotion of economic convergence (Cini, p. 37, 2003). This refers to the catching-up effect of lagging economies with the average (Leonardi, 1995), constituting, alongside ‘regional competitiveness and employment’ and ‘European territorial cooperation’, one of the three objectives set out in the Regional Policy of the European Union, also referred as the Cohesion Policy.<sup>4</sup> Parallel to the basic four freedoms within the framework of the SEM, structural policies aim to boost the aggregate competitiveness through the improvement of the economic well-being of regions in the EU, e.g. through the minimisation of regional disparities (e.g. Hix & Hoyland, 2011; Cini & Perez-Solorzano Borraran, 2010). The Cohesion Policy covers Europe's poorest regions whose per capita gross domestic product (GDP) is less than 75% of the EU average. Similar to the increased mobility levels, cohesion policies were considered as part of the SEM project in response to challenges from China, India and other emerging economies as well as from more established competitors, such as the United States.

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<sup>3</sup> Some of the Central European countries put up restrictions for workers, which were lifted in 2011. From now onwards, central and Mid-Europe are used interchangeably and refer to the core European countries such as Germany and France.

<sup>4</sup> The Treaty Establishing the European Community (Art. 158, TEC) defines economic and social cohesion in terms of reducing regional disparities in the level of development, usually measured by GDP per head (relative to the EU average) in terms of purchasing power parities.

In essence, convergence between the regions and member states as well as an active level of labour mobility are seen as providing one of the essential pillars for a competitive European Union.

### **Migration and divergence**

The large south-north migration corridor, as a result of economic instability in the southern member states in the European Union, provides another example of how increased labour mobility is a result of divergence instead of convergence. Mundell (1961) argued that labour mobility in monetary union zones is endowed with a special function, as according to optimum currency theory (Mundell, 1961), labour mobility in monetary unions is essential as it can provide an adjustment effect in cases of asymmetric shocks. That is, in a monetary union with an optimum currency area (OCA), the active flow of labour migrants is advanced as a fundamental criterion as they have a regulatory effect. However, in the literature, labour mobility as an adjustment mechanism is argued to have been a failure as it has never taken place in significant numbers in the European Monetary Zone (e.g. Hix, 1999, p. 300). This raises the doubts about the practical functionality of labour mobility in converged regions, leading to the question as to whether it is really necessary as currently put forward in the theoretical debates and by the EU Commission. Although labour migration caused by asymmetric shocks took not only place between the EMU member states in the last crisis, nevertheless increased divergence in the EU shows how increased labour mobility is a result of economic disparities, as opposed to convergence.

To summarise, from the beginning of the EU, labour mobility was seen as a key component of integration. However, it was not brought centre stage until the rejuvenation process of integration galvanised by the establishment of the SEM and with the adoption of the neoliberal policy agenda in the 1980s. This was a time when the focus was set on the liberalisation of the market and on the removal of internal barriers. With the spread of neoliberal ideas and a new market-driven approach, labour mobility became a priority as it was supposed to ensure a market that operated smoothly and efficiently. That is, labour mobility was not only considered as being beneficial for the individual EU citizen from a socio-political view, for it was also

seen by the leaders as a core integrative tool for maintaining the economic health of the whole community.

### Research question

Particularly since the introduction of the Single European Market and the liberalisation of the labour markets between the EU member states, the EU has set high or increased mobility aims as one of its aims on its policy agenda. One of the other goals is to achieve convergence. This research concerns whether high levels are achievable in converged regions. Therefore, the main research question is:

The paradoxes of neo-liberalism in the EU: is it possible to have high mobility levels in converged regions?

In order to find out whether convergence, i.e. the reduction of economic disparities, and high mobility levels, compatible, this research involves testing the migration theories on labour migrants who came to the UK from different regions through three case studies. For the first case study it is hypothesised that large migration streams can be accounted for by the neoclassical theory. In the second case study chapter, the hypothesis is that mobility levels are low when economic incentives to move are missing (neo classical theory is not applicable). The third case study concerns the motivation of labour migrants from partially converged regions under the impact of economic crisis. The final aim of the research is to provide an explanation for the low mobility levels in Europe from a new perspective that is distinct from the conventional approaches in the current literature.

### Methodology

The majority of the studies on east-west labour migration comprise quantitative analyses with large data sets. This study is aimed at explaining Polish, German and Portuguese labour migration through the employment of qualitative methods triangulated by the use of large secondary datasets. Specifically, data collected on the personal characteristics, feelings, thoughts and attitudes of the three groups of labour migrants are subsequently compared with numerical data gathered from EUROSTAT and the World Bank, among other sources. In other words, micro-socio characteristics are integrated with macroeconomic data. The novelty of this study lies

in the accumulation of first-hand information via primary data from the migrants in their destination countries through personal, face-to-face interviews. Unlike the previous studies, the outcomes are not based on predictions or assumptions from ‘potential migrants’ from cross-countries surveys, but rather, on first-hand information from migrants who in fact ‘moved’. Subsequently, the gathered data from the field research are embedded into the macro framework and its fit with the theoretical literature, descriptive statistics, as well as existing studies, is examined. This allows for the interactions of the various determinants to be uncovered, in particular, the interrelations between the economic and social factors.

### **Significance of work and originality**

To sum up the *prima facie* evidence on migration flows in Europe, according to the European Institutions, mobility in European nation states lags behind the level they desire. A substantial number of studies have examined the determinants of the various migration patterns in the EU. Special attention has been given in the literature to the large streams of migration, whereas regarding the ‘lower’ levels, generally the questions revolve about why they are low in relation to institutional, social or cultural barriers, rather than asking about the determinants. Hence, it is not possible to ascertain why EU citizens do not move between particular regions, or move in lower numbers. Despite there being a wealth of studies about the mass migration of the EU enlargement countries based on statistical data, few have researched the motivations of migrants from the lower GDP countries on a personal level. In addition, there has been scant investigation of the dimension of convergence, in particular, in relation to the qualitative perspective.

The consideration of the convergence theory within the debate on labour migration in the EU and its incorporation into the framework of migration offers a novel approach to the studies of migration. This will allow for the differences in motivation to migrate to be elucidated in a more efficient way and help in addressing the issue as to whether the EU Commission’s desire to increase mobility levels is realistic in converged regions. Furthermore, the thesis outcomes will add to the discussion on intra-EU migration by contesting the idea that the ‘reduction of barriers’ can lead to significant change in mobility levels, which still prevails as the dominant narrative across the Union. In place of this, it will be argued that the determinants

underpinning the motivation to migrate are the main factors that need to be considered.

### Structure of the thesis

Following this introduction, in Chapter two, the first section contains a review of the extant theories of migration, thereby revealing their complex frameworks and models. Those most pertinent will be summarised in a table according to their variables and types of determinants. The following section will provide a brief literature review on intra-EU migration and the determinants of migration and mobility in the EU as well as a critique regarding the shortcomings of the literature on such migration. Lastly, the various definitions in relation to types of migration and mobility will be discussed.

Chapter three focuses on the practical side of mobility and migration within the EU. The first section will portray the emergence of the concept of labour movement in the European Union. It will demonstrate how the perspective changed after the introduction of the Single European Market and the liberalisation of the markets from those of ‘free movement’ to ‘increasing mobility levels’. It will be underlined how the EU Institutions have favoured high mobility levels in the European Union, regarding this as one of the major priorities on their policy agenda. Next, higher mobility levels are considered in the context of the convergence and social cohesion agenda of the EU. After discussing the implications of the convergence theory, the chapter will close with a brief discussion on the viability of having increased labour mobility, as desired by EU Institutions, in a converged EU.

Chapter four will explain and justify the methodology of the research. After presenting the research design, which includes a discussion on the variables, data collection, interview techniques and participant selection, the country profiles for each case study and the criteria in relation to why they were regarded as suitable subjects are explained. Particular focus will be given to their economic performance and convergence levels since their membership of the EU, as well as their migration levels.

Chapter five will investigate the determinants of the decision-making process of Polish migrants to the UK. Those determinants identified in the migration theory

chapter will be applied to the narratives of the labour migrants. In other words, the aim of this chapter is to find out what kind of determinants prevail among Polish labour migrants and whether and if so, how, they relate to macroeconomic factors. The findings from the field research will be triangulated with secondary data.

Chapter five will present the findings in the context of migration of Germans who came to London to work. The main interest is to find out the determinants undergirding their decision-making process in relation to migration and to elicit the extent to which the migration theories discussed in the theory chapter are applicable.

Chapter six will examine the stories of Portuguese labour migrants who came to the UK to work during the economic crisis. The focus of this case study is to analyse how the divergence experienced by this nation after the recent economic crisis, as opposed to convergence, has impacted on its migration levels to other EU member countries.

Chapter seven presents a discussion of the findings in relation to theories in the extant literature and in so doing addresses the research question. The chapter will also explain the significance of the results within the framework of EU Integration and draw conclusions about how they might challenge the dominant narrative within the Union, namely, underlining the fact that mobility levels are low. The chapter closes with consideration of the limitations of the study, the generalisability, and the implications of the findings regarding the aims and objectives of intra-EU migration and convergence.

## **Chapter 1 Theories of Migration: Why do people move? A review of the most common theories of migration**

### **1.1 Introduction**

Studies of migration theories seek to understand the causes and consequences behind the geographical movement of individuals. Whilst migration theories began with the interlinking of simple economic driven incidents in the early 20th century, their analysis became increasingly interdisciplinary and migration itself became a highly complex phenomenon; which led to the establishment of an independent academic discipline in the field of social sciences. Throughout the years, a variety of different theoretical models have been put forward to explain why (cross-border) migration occurs. Despite each theory ultimately seeking to explain the same process, differing assumptions, concepts and frameworks regarding different dimensions have evolved over time. The various theories however, emerged in an isolated way from each other, such that the absence of a comprehensive migration theory has been a major complaint of several migration researchers (Lee, 1966; Massey et al., 1998; Zelinsky, 1971). In spite of the fact that there have been numerous calls and attempts to develop one general migration theory, so far all the theoretic models have failed to explain the phenomenon in this way. Among the main reasons why it is so difficult to generalise about its causes and consequences of it lies the difficulty of separating it from other socioeconomic and political processes, as well as the complex nature of combining macro- and micro-level theories of migration (Salt, 1987; Van Amersfoort, 1998). Notably, the complexity and interrelatedness has led some scholars of migration theories to the conclusion that there probably will never exist one single and comprehensive theory.

Regarding, in particular, the studies on intra-EU migration, there is no particular theory, which addresses the European Union as one special unit or field of theory. The economic type of migration is currently considered as the only single significant migration stream, due to its large numbers. Other types of movement are not considered as ‘migration’, as their numbers are regarded as ‘too low’, although they do exist. In recent decades, most attention has been given to east-west migration and the literature in this field has grown enormously. The flows from the new European

member states from the peripheries of the EU into the core ones in Central Europe are the currently the mostly discussed migration stories in the literature on intra-EU migration. The guestworker schemes as far back as the 1960s and 70s represent the last wave. Another recent focus in the migration literature is the ‘low’ mobility levels within the EU. These research studies explain the massive migration flows largely based on the neoclassical theory as presented below. However, there is no theory that can account for those small streams of migration across the wealthier member states. The existing theories provide insufficient evidence to explain the different levels of migration within the EU. As this study will reveal, people in the EU move not only for economic, but also, for social reasons and the levels of mobility vary according to these two determinants and their variables. Nevertheless, there is no migration theory at present that considers both types of determinants in one migration framework with assigned weightings for each. Thus, the complexity of the migration theories is also proven within the theorisation of intra-EU migration.

In this chapter, a brief overview of the present theories of migration and their determinants are presented. The aim is to identify their basic tenets, which will provide the foundation for the following discussions and analyses on the migration of EU citizens between member states. The coverage of the migration theories, in particular, involves highlighting the most popular migration concepts from the literature as well as those considered as most relevant for migration and mobility in the EU. After the theoretical exposure of the causes of cross-border migration, the variables of the determinants of migration will be extracted and placed within one table so as to provide a summary of the variables, determinants and their characteristics. The second part of the chapter contains a brief literature review on the determinants of labour migration in the EU. Here, the most commonly discussed migration theories in the literature within the framework of intra-EU labour mobility are covered.

## **1.2 The levels of migration and the nature of migration studies: Frameworks of migration models**

Migration theories are commonly classified according to the level they focus on and the literature distinguishes three levels: macro, meso and micro. Theories on migration on the macro-level approach the problem by examining global structural



factors and conditions (largely economic, but also political and legal) that induce migration. The meso level, in between the micro and macro levels, involves focusing on the household and community. Specifically, the social relations and social ties between individuals in kinship groups (e.g. families), neighbourhoods, and friendship circles or even within formal organisations are investigated. At the micro-level, how these forces shape the decisions and actions of individuals and families is examined. Basically, the factors that motivate individuals to move are determined.

It was Faist (1997) who elaborated upon the three different levels of analysis and provided a clear differentiation through an explicit separation between the structural (macro), relational (meso) and individual levels (micro). According to this scholar, the macro level pertains to the political, economic and cultural structures of the country of origin (sending country) and the country of destination (receiving country). He denotes an array of factors in their political and economic systems, e.g. political stability, administrative units or differences in characteristics, such as living standards, jobs, working conditions, unemployment rates and wages as well as differences in the normative expectations as being the drivers at this level. In the cultural realm, the collective identity, for example, constitutes such a factor. The author noted that “such differentials are important prerequisites for migration to occur between nation-states” (Faist, 1997, p. 194-195).

On the relational or meso-level, the density, strength and content of social relations between stayers and movers within units in the areas of origin and destination are relevant. The social ties of the two parties vary with respect to ‘density, strength and content’ and can pertain to the receiving or the sending countries or to both at the same time. The density can vary from a dense network of social ties to a break (no social relations anymore) or a reorientation in the country of destination. The social ties can be maintained in the origin country even in the case of permanent settlement in the destination country and hence, this does not necessarily mean fewer social ties to the origin country. At the individual or micro level, the degree of freedom or autonomy of a potential mover is important, or in other words, the degree to which he or she has the ability to decide on moving or staying. Whilst at one end, a migrant does not have the possibility of being the essential decision maker (e.g. slaves, convicts, contract workers or spouses), at the other, there are individuals with a high

degree of autonomy, based on resources such as money, information and connection (Faist, 1997). In the literature on migration, the separation between the three levels is relatively common. This division allows for an improved understanding of international migration by reducing the complexity of the numerous theories.

#### 1.2.1 The migration-system approach and the individual rational choice decision-making model

##### *1.2.1.1 The migration-system approach*

Migration system theories are associated with the following four characteristics: firstly, it is assumed that a migration system provides the context in which movement occurs, which influences actions on whether to stay or move. This means that a migration system is defined by at least two places that are connected to each other. Secondly, the connection is based on linkages, e.g. between trade and security or even colonial ties and flows of goods, services, information and ideas (Portes and Walton, 1981). Thus, migration system theories, in particular, stress the ‘existence of linkages between countries other than people’ (Faist, 1997, p. 192), which often exist before migration occurs. Historic examples are the case of European receiving countries, (e.g. France, Netherlands and Great Britain). A third character of migration system theories is, according to Faist (1997), that movements are not a “one-time event but rather a dynamic process, just as push-pull or cause-effects and turn into a self-feeding process” (p. 193), as networks reduce the monetary, opportunity and psychological costs of adjustment. Lastly, according to factors such as economic inequalities within and between nation-states as well as the admission policies of the receiving states, individuals, households and families develop strategies to cope with stay-or-go alternatives. As Charles Tilly (1990) put it, it is “not people who migrate but networks” (Tilly, 1990, p. 75). The system-theoretic perspectives do not completely ignore other factors, but embeds them into the framework, such as wage differentials or administrative barriers. They rather contribute to the enhancement of the flow of migrations or slow down migration. Thus, it can be contended that network theory is closely affiliated to the migration systems theory. The latter’s main assumption is that migration alters the social, cultural, economic and institutional conditions at both the sending and receiving ends, hence, forming an entire developmental space within which migration

processes operate (de Haas, 2009b). Moreover, the environment is subject to constant change, thus making the system open and dynamic. Other authors (e.g. Kritz & Zlotnik, 1992) have also emphasised the importance of viewing international migration as an interdependent dynamic system. While migration systems theory has its roots in geography, migration network theory is of sociological and anthropological origin (Recchi, Baldoni, Francavilla, and Mencarini and Miller, 2009). The key deficit of migration system theories is that, there is no clear understanding of the mechanisms by which macro-factors shape micro-level decision-making.

#### *1.2.1.2 The individual rational choice decision-making model*

The opposite lens to the migration system theories is the framework of rational choice. Whilst the former move from the macro towards micro level theories, in the latter, the model of migration decision-making theory grounded in moving through the levels in the opposite direction, i.e. micro to macro (Faist, 1997). Regarding the microeconomic model, labelled the model of individual choice by Massey et al. (1993), the fundamental idea is that individuals act rationally to maximise their utility. On the basis of a set of tastes, in particular, preferences or additional values, such as expectations and information, the individual's option will result in the highest perceived value. Certain elements, such as information, play an important role as with their availability, migrants can optimise their benefits. Preferences, or values, can differ in their nature: improving and securing (wealth, income), status (a prestigious job) or comfort (better working and living conditions). Rational choice decision-making models are regarded as a powerful concept among the migration models. However, researchers in the sociological as well as anthropological fields have come to the conclusion that migration decisions are frequently taken in social units, such as the family or at the community level, rather than that of the individual decision maker. Also, within the rational choice model, it is difficult to link micro elements to macro elements. Faist (1997) argued that both the migration system model as well as the model of rational choice show a decisive weakness in "conceptualizing the social ties of movers and stayers within families or households and networks' and that processes between these social units have to be brought into analysis. He contends that more attention should be paid to the meso-level relational

(social ties). Following the critiques, “both rational choice and migration-systems theories have started to place more emphasis on processes linking micro- and macro-levels” (Faist, 1997, p. 191).

Furthermore, studies of migration differ in their nature. From the perspective of a demographer the central question is the nature of the population change. Whilst anthropologists’ goal is to engage in cross-cultural comparisons that make possible generalisations across space and time, and hence “nomothetic theory building” (Brettell & Hollifield, 2000, p. 4). By contrast, historians’ principal research questions are related in particular to paces and times, focus more on individual migrants as agents. They are less concerned with explaining how social structures influence constraint behaviour. Nevertheless, their questions are similar to those of other social scientists, such as: what are the determinants (and consequences) of population movement? In more precise terms, they ask who moves, when do they move, why do they move. Coming to sociologists, this group of researchers tend to emphasise social relations as central to understanding the processes of migration and are especially interested in its causes (Brettell & Hollifield, 2000, p. 4-5). So far as economists are concerned, although their set of research questions on migration is similar to those of sociologists, they often focus on other units of analysis, such as the labour market in the receiving society or the economy of the sending ones. Despite economists also borrowing from and working with other disciplines, demography, sociology and history, for example, they maintain their focus on their own methodology and models, especially the rational choice model (Brettell & Hollifield, 2000, p. 18). Their research analysis is heavily based on predictive models. Brettell and Hollifield (2000) noted that economics can also operate at both the macro and micro levels, depending on the research questions. To exemplify this, economists have not only theorised about how wage or employment opportunity differentials between sending and receiving societies affect general flows of populations, but also, about how such differentials influence individual household costs/benefits.

Regarding this research study, after having considered the complex nature of the movement of people in converging and converged regions, this research will provide evidence of how difficult it is to capture the act of migration in one overarching

framework. The migration theories covered in the next section are considered in light of the economic and social variables they identify.

### 1.3 The most common theories of migration

#### 1.3.1 The foundation of the migration theories: Ravenstein's laws of migration

The first scholarly approach to migration theories dates back to the late 19th century with Sir Ernest George Ravenstein's two articles which formulate the "laws of migration" based on theoretical work and empirical data (Ravenstein, 1885; 1889). As Lee (1966) notes, many of the generalisations, or 'laws' of migration developed by E.G. Ravenstein in his two classic papers (Ravenstein, 1885 and 1889) have stood the test of time and still remain starting-points for contemporary migration theories. In his theoretical and empirical work, Ravenstein perceptively analysed relations between the propensity and distance to move by constructing the seven 'laws' of migration. The laws can be summarised briefly as follows: (1) The majority migrate only short distances and thus establish 'currents of migration' towards larger centres. (2) This causes displacement and development processes in connection with populations in the sending and destination regions. (3) The processes of dispersion and absorption correspond to each other. (4) Migration chains develop over time. (5) Migration chains lead to exit movements towards centres of commerce and industry. (6) Urban residents are less prone to migrate than rural people. (7) This is also true for female population (Massey, 1994).<sup>5</sup> Although he did not construct a theory, but rather a description of various patterns, Ravenstein himself found abundant evidence for these 'laws' in mid-nineteenth-century internal English migration (Massey et al., 1993). Later, to garner whether his generalisations were true or not, they were placed into different frameworks, such as the rational choice and systems theory (Faist, 1997, p. 189). During the course of the second half of the 20<sup>th</sup> century, the numerous theories of migration emerged, so to speak, on the basis of Ravenstein's observations, the forerunner of the total migration theories. Two of the currents of migration theorising were in particular influenced by Ravenstein's work, namely the push-pull model and economic model based on neoclassical presuppositions, which are presented next.

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<sup>5</sup> See Todaro (1976) p. 15 or Faist (1997) p. 34 for other summaries on Ravenstein's laws of migration.

### 1.3.2 Macro-level theories

#### *1.3.2.1 The neo-classical theory of migration*

The oldest and best-known theory of international migration is the neo-classical theory. It was originally developed to explain labour migration in the process of economic development, i.e. supply of and demand of labour between the rural traditional agricultural sector and the urban modern manufacturing sector. It appeared in the early works of Lewis (1954) and Ranis and Fei (1961) and concentrates on the economic aspect of migration. It can be employed from the perspectives of two dimensions – macro and micro.

At the macro-level, in the neoclassical theory the most basic model assumes that migration results from ‘actual’<sup>6</sup> wage differentials across markets or countries. The process of migration is initiated thanks to the existence of the following economic combination: a country generally characterised as having a low market wage with a large endowment of labour relative to capital. By contrast, if a country exhibits only a limited endowment of labour relative to capital, then its market wage is generally high. The resulting differentials in wages cause workers to move from the low-wage, labour-rich country to the high-wage and labour-scarce countries or regions (from rural areas to the cities). Therefore, the central argument of the neoclassical theory proposes that wage differentials are the main cause of migration and that the volume of migration is determined by the relative differences in the supply of and demand for labour in different geographic locations. In these models migration occurs until wage equalisation has occurred.

Harris and Todaro (1970) augmented the simple wage differential approach by adding the consideration of the probability of employment when deciding to move instead of simply calculating the income differentials. The latter added that the migration models were mainly developed in the context of advanced industrial economies and thus, assumed the existence of full or near-full employment, proceeding to write, “‘unfortunately, such an analysis is not very realistic in the context of the institutional and economic framework of most Third World nations’” (Todaro, 1976, p. 29). Known as the “Harris-Todaro model”, their basic two-sector

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<sup>6</sup> As opposed to ‘expected’ earnings in the extended versions of the neoclassical theory.

model of rural- to urban labour migration assumes that as long as rural-urban income differences remain high enough to outweigh the risk of becoming unemployed, the “lure of relatively higher permanent incomes will continue to attract a steady stream of rural migrants” (Todaro, 1969, p. 147). Under the assumption of full employment, the model predicts a linear relationship between wage differentials and migration flows. Consequently, in the extended version of the model, migration is determined by ‘expected’ rather than actual earnings and the key variable ‘earnings’ is weighted by the probability of employment. The Harris-Todaro model was modified further in the literature, e.g. in the works by Johnson (1971), Porter (1973), Bhagwati and Srinivasan (1974), Corden and Findlay (1975), Fields (1975) and others.<sup>7</sup> Maansoor and Quillin (2006) and Krieger and Maitre (2006) determined the margin in their empirical study and found out that more than 30% wage differential<sup>8</sup> has been set as a margin to override the costs of migrating. Moreover, they found that the linearity relationship in the wages-migration tandem in fact does not hold. Accordingly, both the degree of wage differentials, as well as the level of country income, matters.

To put it briefly, the simple propositions and assumptions that result from the neoclassical theory are (ignoring the employment possibilities) as follows:

- The international migration of workers is caused by differences in wage rates between countries/across borders
- The elimination of wage differentials will end the movement of labour and migration will not occur in the absence of such differentials

The neoclassical model has been tested a lot, for instance, one of the principal migration theorists, Massey et al. (1994) attempted to test the neoclassical equilibrium model and could confirm in their study that “immigration is tied to international differences in wages” (Massey, 1994, p. 710). The theory constitutes one of the major theories that are used to explain the prominent east-west migrations. Rather than providing a sufficiently suitable explanation for the causes of migration, the neoclassical theory served as a foundation theory for further upcoming studies,

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<sup>7</sup> See Todaro (1976, p. 40-45) for more.

<sup>8</sup> Income differentials (measured as GDP per capita) between EU8 countries and the EU15 average at the time of EU accession were greater than 30%.

which resulted in emergence of numerous other research designs regarding the phenomenon.

#### *1.3.2.2 Dual labour market theory*

The dual labour market theory explains migration based on structural changes in the economy. As opposed to the neoclassical theories of migration it is explained entirely from the perspective of the macro level. The determining variable is the characteristics of the labour market in the receiving country. Developed by Piore (1979), under this lens it is contended that migration is caused by a strong labour demand (pull-factor), which is inherent to the economic structure of developed nations. Piore (1979) maintained that migration is not caused by push factors in sending countries (low wages or high unemployment), but by pull factors in the receiving countries (i.e. a chronic and unavoidable need for foreign workers). Accordingly, in advanced economies the occupational structure unfolds along two lines, a duality, which capital intensive where both skilled and unskilled labour is utilised, and labour intensive where unskilled prevails. This particular character of the economy in advanced countries creates a demand for low-skilled jobs, which domestic workers refuse to take up due to, for example, their seeing them being beneath their status, i.e. wages reflect status and prestige. Moreover, there is a primary sector providing well-paid jobs and a secondary sector, for unskilled jobs, e.g. manufacturing. Due to structural inflation, there are constant wage rises in the former sector. However, proportionate wage rises in the secondary are considered too expensive and the consequent lower pay makes the secondary sector unattractive to native workers. Migrants are more motivated to work in these low-status jobs, because they do not consider themselves as part of the destination society. Employment in the secondary sector fluctuates according to the economic cycle, making it unstable and their being an uncertainty of work availability, which is again unattractive to native workers. In addition, traditional influxes of labour in the secondary sector, such as woman and teenagers are not available any more, due to demographic changes. As immigration becomes desirable and necessary to fill the job vacancies, policy choices, in the form of active recruitment efforts, address the needs of the market. In the history of labour migration in Europe, the existence of the dual labour market perspective is observable in the post-migration trends during the



period immediately after World War Two as part of the reconstruction process, when the core economic powers of the EU signed bilateral agreements in the 50s and 60s and started to recruit migrant a labour force not only from the Mediterranean countries like Italy, but also from then non-EU countries, like Portugal and Spain or even from Turkey. Today, however, it cannot be claimed that the dual labour market theory perspective plays a significant role.

In general, the dual labour theory for today's EU labour market is undoubtedly too simple to explain the complex phenomenon of intra-EU labour migration. Whilst the dual labour market theory implicitly 'asks' migrants to come, it will be shown in the second part of the chapter how the interrogation of the low mobility levels has changed regarding today's older EU member countries, and that the literature now prioritises asking "why do people 'not' move". Massey wrote, "although this perspective has been influential in labour studies, it has suffered from various conceptual and methodological shortcomings" (Massey et al., 1994, pp. 715-717).

#### *1.3.2.3 World systems theory*

The world systems theory developed by Wallerstein (1974) takes a historical structural approach and explains migration by linking the determinants to structural changes in world markets. As a result of globalisation, the increased interdependence of economies and the emergence of new forms of production (Massey at al. 1993) can be accounted for, which are neglected in the other theories of migration. Capitalist expansion entails new capitalist farming methods, land consolidation, etc., leading to stronger transportation and communication links.

This particular kind of approach, based on historical and structural changes, denies the free choice of individuals during the migration process (de Haas 2008), thus implying that the resulting migration patterns are deterministic. This makes it evidently difficult to determine the exact mechanisms of migration. The study of international migration in the recent years has lost a lot of the world systems or global development perspective that was present in the earlier works, perhaps not least because is difficult to derive a set of testable hypotheses and the character of this framework is strongly descriptive as it emerged as an ex ante formulation of empirical facts (Favell 2008a; Bijak 2006).

#### *1.3.2.4 Migration system model*

The world systems theory can be linked to Mabogunje's (1970) system model of migration, through which he explains the phenomenon as a dynamic spatial process. Aggregate migration flows and interactions are modelled by starting with a pool of rural potential migrants that is affected by various factors in the decision to migrate. The rural control sub-system controls outflows (e.g. family or community norms), the urban control sub-system controls inflows (e.g. through employment agencies), feedback is channelled back to potential migrants and the background environment also affects migration flows (social and economic conditions, government policies, transport and communications infrastructure etc.). The environment and subsystems are constantly changing, also as a result of the migration flows, which make the system open and dynamic. Other authors (e.g. Kritz & Zlotnik, 1992) have also emphasised the importance of viewing international migration as an interdependent dynamic system, for sending and receiving countries and feedback, with adjustment coming from the migration process itself. The authors contend that it is important to take note of interactions between different actors and to emphasise the dynamic nature of migration (ibid). Nevertheless, the migration system models are vague and hence, do not allow for concrete prediction of migration trends.

#### *1.3.2.5 Mobility of transition*

Zelinsky's hypothesis of mobility transition (1971) holds that migration is part of the economic and social changes inherent in the modernisation process. It should be considered under the lenses the wider range of functionalist theories of social change and development, which try to link theories to past empirical trends. The author argues that patterns and rates of migration can be closely linked to the stage of modernisation (e.g. industrialisation) and demographic factors (e.g. high birth rates). He emphasises that the preference for more personal freedom is part of the modernisation process. While his theories broadly make sense when looking at past migration patterns in industrialised nations, it is vague and does not allow for differentiation of different types of migration or consider individual migration decisions.

### 1.3.3 Micro-level theories

#### *1.3.3.1 The push-and-pull theory of migration by Lee*

Lee (1966) revised Ravenstein's 'laws on migration' and proposed an entirely new analytical framework. He focused on the development of a more general schematic framework for analysing the volume of migration that takes into account the development of 'streams' and 'counter-streams' as well as the characteristics of migrants. In his view, the decision to migrate is determined by factors associated with the area of origin and the area of destination: "no matter how short or how long, how easy or how difficult, every act of migration involves an origin, a destination and an intervening set of obstacles" (Lee, 1966, p. 49). Basically, the emphasis is put on the economic context of the flow of workers (Bauer and Zimmermann, 1999, p. 20) and less exclusively on the economic advantages. Lee (1966) embedded the factors that enter the decision to migrate and the migration process under four categories, which are: 1) Factors associated with the area of origin; 2) Factors associated with the area of destination; 3) Intervening obstacles and; 4) Personal factors.

The origin and destination area are assumed to have 'positive' or 'negative' factors, which 'pull' or 'push' people away from the particular areas. These factors push migrants towards (non) migration, which, however, can be hindered by intervening factors. The intervening factors exist between all origin and destination points, e.g. Lee (1966) formulated the so-called intervening obstacles as distance, physical barriers, transport costs, restrictive immigration laws and physical controls over population movements, where some contribute only 'minor frictions', whilst others can be 'insurmountable' (Todaro, 1976, p. 18). It is noteworthy to mention that these intervening obstacles tend to exert differing influences on different people: a minor obstacle to one potential migrant can be a major obstacle to another.

Secondly, according to Lee (1966), personal factors as well as individual traits also play a role in the decision-making process about whether to migrate or not. The individual characteristics of the migrants respond differently to 'plus' and 'minus' factors at origins and destinations, possessing different abilities to cope with the intervening variables (Reniers, 1999, p. 681). However, by and large, there exists a

general set of factors towards which most people tend to react in the same way (higher wages, more job opportunities, better amenities, etc.). Todaro (1976) acknowledged that the importance lies in the ability to identify these factors and to quantify their influences on different classes of people. Uncertainty, expectations and risks become an important element in the migration process, as people living in the former place will possess better knowledge of the precise outcome of origin pluses and minuses than they will of that in the potential destination (Todaro, 1976, p. 18). Based on his conceptualisation, Lee (1966) formulated a number of general hypotheses about the volume of migration, the development of stream and counter-stream and the characteristics of migrants. (see Lee, 1966, pp. 53-57). In the migration literature, Lee's analytical framework is simply known as the 'push-pull' model.

This model has gained enormous popularity within the migration literature and has become the dominant migration model in secondary as well as university education. Because of its apparent ability to integrate other theoretical insights, it has been frequently suggested that a general view of labour migration could best be achieved using a push-pull framework (Bauer & Zimmermann, 1998; Schoorl, 1998, p. 103). The major critique of it in the literature is its inability to determine the dominant factors, seemingly implying that push and pull factors are largely a mirror image of each other (de Haas, 2008). Consequently, it is unable to determine which plus factors, and which minus ones at both origin and destination are quantitatively the most important to different groups of people, nor does the existence of intervening obstacles help in comprehending which are major and which are minor. By not specifying the inter-relationships between dependent and independent variables within the context of a rigorous theoretical framework, Lee's (1966) theory of migration and indeed, most other 'non-economic' social science migration models offer little practical policy guidance for decision-makers in developing nations (Todaro, 1976, p. 19). It is probably for this reason that Todaro (1976) claimed that 'in seeking such a practical policy guidance, we must inevitably turn to the economist's formulation of the migration problem to econometric methods' (p. 20).

Regarding the theory within the framework of this study, the push-and pull perspective does apply, to some extent, to the migrants in the EU. However, in the

literature survey not much emphasis is placed on this model concerning labour migration in the EU, because there is little evidence that it is applicable.

#### *1.3.3.2 The human capital theory: The neoclassical micro-level migration theory*

The neoclassical model can be transferred to the micro-level of individual choice. At the micro level, under this theoretical lens, migrants are considered as individuals and rational actors, whose decisions to move are based on a personal cost-benefit calculation (Sjaastad, 1962; Todaro 1969, 1976, 1989; Todaro and Maruszko, 1987). The microeconomic model of individual choice, termed the human capital theory of migration, was first introduced by Sjaastad in 1962 and enriches the classical framework by incorporating the socio-demographic characteristics of the individual as important determinants of migration, such as age, skills, human capital endowments, marital status, gender, occupation as well as preferences and expectations. Heterogeneity between individuals is an important factor and different individuals in the same sending country demonstrate different propensities to migrate, also choosing different receiving countries (Bonin et al. 2008).

The core of the rationale behind the human capital theory can be described as follows: when the calculations of the individual migrant meet the expectation of a positive net return, only then will the potential migrant move (Bauer and Zimmermann, 1999). To paraphrase, basically each potential migrant compares the costs and benefits relating to mobility before taking the decision whether or not to move. Given the precondition that there exists free choice and full access to information, the individual will choose to go where he/she can earn the highest wages and be the most productive. Before moving, the migrant estimates certain investment, such as the costs of travelling, the cost of maintenance while moving and looking for work, the effort involved in learning a new language and a new culture, the difficulty in experiencing, while adapting to a new labour market as well as the psychological costs of cutting old ties and forging new ones, amongst other things (Massey, 1993). Generally, they will migrate to regions where the expected discounted net returns are greatest over some time horizon (Borjas, 1990).<sup>9</sup> Human

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<sup>9</sup>Net returns in each future period are estimated by taking the observed earnings corresponding to the individual's skills in the destination country and multiplying these by the probability of obtaining a job there (and for illegal migrants the likelihood of being able to avoid deportation) with the "expected destination earnings." These expected earnings are then subtracted from those expected in

capital endowments, like skills, age, marital status, gender and occupation are considered as highly influential factors that strongly affect the individuals in making their choice whether to move or not. The majority of the studies agree that the likelihood of migration decreases with age and normally increases with education level (Bauer and Zimmermann, 1999). Hence, the human capital approach assumes that migration tends to have a stronger effect on skilled people as it increases their chances of success.

The human capital theory was tested empirically in several studies, such as Todaro (1969), Harris and Todaro (1970), Mincer (1970) and Bielby (1992), all of which incorporated more than one migration decision-making theory within a single research study, namely, the human capital and the network theory. Other scholars that have used the human capital theory to explore migration decision-making include those of Yezer and Thurston (1976), Hunt and Kau (1985) Farber (1983) and Shumway and Hall (1996). However, within the context of migration in the EU, the ‘skill factor’ led to irregular as well as paradoxical observations during the course of this research study. The theory of the microeconomic model of individual choice is questionable regarding its accuracy when applied to the EU citizen and this is discussed further in the subsequent section. The microeconomic model seems very attractive from the formal point of view, however, it has received the severe criticism that people do not necessarily behave in an unconditionally rational manner. Rather, it is often argued that their decisions are dependent on the information, which could be incomplete (Fisher, Martin and Straubhaar, 1997). Moreover, within this approach the social context is neglected, but this has been addressed by the new economics of labour migration (NELM), which is discussed next.

#### *1.3.3.3 Wolpert’s stress-threshold model*

There are two more theories at the micro level, one is Wolpert’s stress-threshold model (1965) and it describes the behaviour of internal migration, similar to a cost-benefit analysis, but it assumes that individuals intend to be rational ex-ante, whilst

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the community of origin (observed earnings there multiplied by the probability of employment) and the difference is summed over a time horizon from 0 to  $n$ , discounted by a factor that reflects the greater utility of money earned in the present than in the future. From this integrated difference, the estimated costs are subtracted to yield the expected net return to migration (Massey, 1993).

they are not necessarily so ex-post. Accordingly, individuals have a threshold level of utility they aspire to. They compare place utilities to this threshold in order to decide whether to migrate or not and to which place. Place utilities for the current position are based on past and future rewards, whereas those for possible destinations depend on anticipated rewards. A lot of factors, such as knowledge (perfect, imperfect information) and action are subjective and depend on the personal characteristics or even on the variability of the environment and life-stage of the individual. Obviously, this makes it very hard to measure or generalise. It has not much significance in the literature of migration theories, similar to the Human Capital Theory.

#### *1.3.3.4 Value-expectancy model*

Another behavioural model, the value-expectancy model (Crawford, 1973), is a cognitive model that holds that migrants make a conscious decision to migrate based on more than economic considerations. That is, the potential migrant's strength of migration intention depends on the multiplication of the values of migration outcomes and expectations that migration will actually come to pass. Values/expectations are specific goals, e.g. wealth or autonomy, being dependent on personal and household characteristics (e.g. education level) and societal norms. These values do not necessarily need to be economic, for example, security or self-fulfilment can also be important to potential migrants. Migration depends on the strength of migration intentions, indirect influences of individual and societal factors as well as the modifying effects of constraints and facilitators. This perspective is similar to the place-utility approach of Wolpert and again it contends that migration choices are subjectively made. There are also other similar micro-based individual behavioural decision making models, e.g. work by de Jong & Fawcett (1981) or the adjustment-to-stress approach of Ritchey (1976). In sum, whilst the behavioural approach also considers non-economic factors and societal influences, it is very vague and rational decision-making is still assumed.

#### *1.3.4 Meso-level theories*

As Massey (1990) argued, the factors that influence migration to start with could be very different from the conditions that make migration continue, i.e. perpetuate.

After an initial phase of pioneer migration, it becomes more common in the community, with more and more people imitating current migrants and being helped by them until it becomes self-sustaining. There are different aspects of the perpetuation of migration, including social capital, social networks, migration institutions as well as cumulative and circular migration, which are discussed below.

In between the micro and macro level exists the meso level, developed by sociologist Thomas Faist (1997, 2000), which comprises linking the rational individual migration decision models to the structural macro migration models. The resources and the feed to the meso level are social relations and social capital in households, neighbourhoods, communities and more formal organisations. Through the use of concepts like social capital, the mechanism with which macro factors shape micro decision-making is made clearer. One example of social ties and social capital in practice is the network theory.

#### *1.3.4.1 Perpetuation of migration: Network theory*

The economic theory models are considered insufficient and some scholars have complained that these “alone cannot explain the actual shape of migration patterns” (Salt, 1987, p. 243; Schoorl, 1998). Hence, the network theory was introduced, which entailed a dynamic dimension. Under this lens, it is argued that when wage differentials or recruitment policies cease to exist, migrant networks, often evolving into institutional frameworks, help to explain why migration continues. The network theory draws attention to the role of nation states, geographical proximity, institutions, social networks and cultural factors in creating new migration patterns. Rather than looking at the ‘determinants’ that are generally considered as being responsible for the movement, the network theory is concerned with what ‘perpetuates’ migration in time and space (Massey et al., 1993). Networks, in this context, are defined as a “set of interpersonal ties that connect migrants, former migrants, and non-migrants in origin and destination areas through bonds of kinship, friendship, and shared community origin” (Massey et al., 1993, p. 448). Massey (1989) contends that once the number of network connections in an origin area reaches a critical level, migration becomes self-perpetuating, because it creates the social structure to sustain the process. Thus, network effects explain the (often unintended) perpetuation of migration, often over formally closed borders,



irrespective of its original causes (Waldorf, 1998). Lee (1966) argues “migration facilitates the flow of information back from the place of destination to the origin, which facilitates the passage for later migrants” (p. 54-55). Böckner (1994) further adds that the already settled migrants function as ‘bridgeheads’, reducing the risks as well as material and psychological costs of subsequent migration. Specific to these situations, friends and relatives are regarded as helpful in assisting and helping the new migrants to find new employment or a place to live, which will increase the likelihood of subsequent migration to that particular place (Appleyard, 1992). This exactly is the point where the network theory comes into force<sup>10</sup> and the existence of a diaspora or networks is likely to influence the decisions of migrants when they choose their destinations (Vertovec, 2002; Dustmann and Glitz, 2005). The larger the network, the lower the cost and risks of migration and the higher the net returns and likelihood of making the decision to migrate. Networks in migration decision-making are considered important as they ensure that potential migrants connect with the relevant sources of information that can help to inform their decision to migrate. Equipped with some positive and negative information, the potential migrants can prepare for the new destination. The network theory has been tested in the works of Hondagneu-Sotelo (1994), Winters, de Janvry and Sadoulet (1998), Reynolds (2002) as well as Curran and Rivero-Fuentes (2003).

Networks have played a vital part regarding labour movement in Europe. Since the beginning of the signing of the bilateral agreements in the 1960s, a multitude of communities from different ethnicities has been evolved and this has persisted up to the present today (e.g. the Portuguese, Greek, and recently the rapid increase in the Polish community in the UK). In general, the network theory certainly has explanatory power in relation to EU migration, especially when it comes to migrants from the lesser-developed countries, but has not been used frequently in the studies, particularly not when explaining migration between converged regions. The applicability of this theory will be tested in this research study for both types of migration, namely high levels as well as low levels of migration. A further theorisation at the meso level is Guilomoto & Sandron’s (2001) study, in which it is proposed that migrant networks perpetuate themselves due to institutionalisation,

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<sup>10</sup> The network theory also helps to explain the reasons why migration patterns are not evenly distributed across countries, but rather, tend to form so-called migration regimes (Faist, 2000).

path dependency etc. and are also affected by external factors e.g. labour market changes. The institutional part of a network refers to the rules and norms governing it that reduce the transaction and migration costs (e.g. children sending home remittances to their parents), whereas the organisational aspects pertain to the practical help given to pioneers within the network.

#### *1.3.4.2 Cumulative and circular causation*

Last meso level theory of migration considered here is cumulative and circular causation (Massey (1990)), under which it is contended that migration becomes more and more common once it has started, by sustaining itself. Past migration alters the context in which current migration decisions are made by changing the socioeconomic context and macro environment of migrant households that then affect the migration decisions of future migrants. Networks expand, migration becomes part of local culture and this makes migration increasingly accessible to all levels of the population. There is likely to be lower labour demand in the areas of origin due to new, less labour-intensive agricultural production methods brought home by migrants and land left empty by them. If more educated people leave, the source regions stagnate, thus increasing the returns from migration. Migration can also change the local income distribution, again increasing the returns from migration. Thus, according to this theory, the more migration there is, the more there may be in the future. Of course, migration does not continue indefinitely, for at some point migration networks become saturated, labour scarcity in the source country increases and migration potential is very low with only old people or children left to migrate. At this stage, migration might start to decrease, which makes the overall migration curve an inverted u-shaped. This theory whilst being very straightforward, is still too broad as an approach.

#### *1.3.5 Further relevant theories*

##### *1.3.5.1 Family decision-making theories (The New Economics of Labour Migration (NELM))*

The more traditional migration approaches focus either on aggregate migration movements or individuals making migration decisions. They, thus, assume that

individuals independently make the decision to migrate. Some of the migration literature includes a seemingly wider decision-making framework, for example, Harbison's (1981) paper is entitled "Family Structure and Family Strategy in Migration Decision Making". However, the migration decision is still not seen as a strategic family decision as the paper only acknowledges that families can influence the individual migrant's decision, e.g. through the demographic structure. When looking at migration from a gender perspective, family structure can influence the migration decisions of women in particular. As Morokvasic (1984) pointed out, women migrate not only for economic motives, but also, to get married, due to social constraints, low rights and lack of protection against domestic violence. Sandell (1977) and Mincer (1978), on the other hand, viewed migration as a family decision, whereby the family as a whole migrates if their net gain is positive. If only one partner finds a (better) job at the destination, the family only migrates if the gains of one family member outweigh the losses of another family member. Under this lens, the family migration decision is thus in essence, an aggregation of individual migration utilities. Bigsten (1988) also considered migration a household decision in which a family allocates labour to the urban or rural sector depending on the marginal products of combined wages.

The 1980s and 1990s represent a paradigm shift concerning the debates on migration from individual dependence to mutual dependence (Stark 1991). The new economics of labour migration (NELM) emerged as a response to the neoclassical theory of migration, criticising the very methodological design of most prior migration research, but in particular, the neoclassical models for being "too individualistic and rigid to deal with the complex and diverse realities of the migration and development interactions" (Haas, 2008, p. 34-35). Thus, rather than considering income maximisation as the most influential factor in the migration decision-making process, the NELM places the behaviour of individual migrants in a wider societal context and considers not the individual, but the family or the household, as the most appropriate decision-making unit (Haas, 2008, p. 35.) As Stark (1991) emphasised "the problem of defining a supra-individual decision-making unit is partly remedied by the 'new economics of migration'". Taylor et al. (1996) noted that "prior work has been unduly pessimistic about the prospects for development as a result of international migration, largely because it has failed to take into account the

complex, often indirect ways that migration and remittances influence the economic status of households and the communities that contain them” (p. 402). The fundamental assumption of the new economics theory is that households and families primarily pursue minimisation of the spread of risk, rather than income maximisation. On the basis of a mutual consensus among the household members, they send one or more off as migrants, in order to ensure the wellbeing of the family. Migrant remittances hereby provide income insurance for the original households, being considered as a risk-sharing behaviour of families and households (Stark, 1991). Consequently, migration (internal and international) is perceived as a household response to income risk and households seem able to diversify their resources, such as labour, in order to minimise income risks, better than individuals can (Stark & Levhari, 1982). While remittances do not play a role in neoclassical migration theory, within the NELM they are perceived as one of the most essential motives for migrating. Within the context of EU migration, the argument with regard to remittances is observable to some extent and has led to the production of a considerable amount of academic research (e.g. Hussain, 2005; Jimenez-Martin et al., 2007), especially in relation to migrants from the Mediterranean regions. However, the NELM theory has not been afforded much attention in regard to mobility in the EU.

The NELM theory has not gained sufficient attention in the academic world and there have only been a few empirical tests regarding it, because of its limited applicability, as it isolates the effects of market imperfections and risks from other income and employment variables. Also, its proponents have been frequently accused of possessing sending-side bias, overlooking dynamics within households (i.e. gender roles) and being too heavily future-oriented (Faist, 2000). Theorists have also ignored or oversimplified the relations between family members, i.e. the social ties that bind or separate family or household members. If basic social relations are disregarded in this way, power and authority relations, (mis-) trust and solidarity cannot be understood in the migration context. For example, the theory does not consider who decides which member(s) migrate(s) and for what reason?

#### *1.3.5.2 The social systems theory*

A sophisticatedly elaborated concept in explaining the phenomenon of migration was developed and presented by Hoffmann-Nowotny (1970 and 1973), which encompasses four levels: individual, national subsystems, national societies, and the international society. The fundament of his theory is based on the two factors ‘prestige’ and ‘power’ in a society, with prestige legitimising power. The factors in a social system are determined by the position and by the status attributed to them (Faist, 1997, p. 192). Due to ‘structural tensions’, which arise from inequalities and status inconsistencies in the sending country, an imbalance between power and status is generated. In order to address this tension, action is taken in form of social mobility, which means giving up the social position held or emigration to a country where status aspirations can be attained (Hoffmann-Nowotny 1973, p. 11-14). In essence, for Hoffmann-Nowotny, (international) migration constitutes an “interaction between societal systems geared to transfer tensions and thus balancing power and prestige” (Hoffmann-Nowotny, p. 1973, p. 19). Despite social systems theory having rarely been discussed in relation to the classical theories of migration, it does introduce two variables, namely, power and prestige, which are deemed of relevance in the context of the current research.

These are some of the most prevalent theories of migration in the literature, whilst there are others, which are not considered at this point as they irrelevant for the framework of this research.

#### *1.3.6 Recap of the theories*

This section contains a summary the migration theories along with their associated determinants and variables. The neoclassical theorists, the forerunners of all the migration theories, argued that income differentials are the main cause for migration. Later, the ‘variable’ employment (unemployment) was added by Todaro (1976), who Argued that “much of the previous research on migration tended to focus on social, cultural, physical, demographic, communication and psychological factors (non-economic)” (Todaro, 1976, p. 28) and consequently, the importance of economic variables was neglected. He even contended that, even though the noneconomic influences are relevant, migration can be explained primarily by the influence of

economics (Todaro, 1976, p. 26). Standing distinctly apart from this model of individual rational choice is the dual labour market theory, which sets its sights away from decisions made by individuals to the perspective that international migration stems from the intrinsic labour demands of modern industrial societies (Massey et al., 1993, p. 28). In contrast to neoclassical theory, since the demand for immigrant workers grows out of the structural needs of the economy and is expressed through recruitment practices rather than wage offers, international wage differentials are neither a necessary nor a sufficient condition for labour migration to occur. In fact, employers have incentives to recruit workers while holding wages constant (Massey, 1993). Thus, earning differences become less pivotal, instead, the (characteristics of) labour market becomes a decisive determinant.

In contrast to the neoclassical equilibrium model, the new economics labour model (NELM) framework treats migration as a complex phenomenon that involves both economic and noneconomic factors. While it does not dismiss the role played by wage differentials between geographic locations, the conclusion under this lens is not that these are the only trigger for an initial wave of immigration. Moreover, regardless what sets in motion the initial impetus to migrate, the establishment of migratory networks serve to perpetuate migration, because 'they lower the costs and risks of movement and increase the expected net returns' (Massey et al., 1993, p. 448).

Under the human capital theory, sociological, as well economic factors are significant, according to which: international movement stems from international differentials in both earnings and employment rates, which determines expected earnings (the prior model, downplayed employment rates, especially at migrant destinations). International movement does not occur in the absence of differences in earning levels and/or employment rates between countries. In addition, under this lens, migration continues until expected earnings have been equalised internationally. The size of the differential in expected returns determines the size of the international flow of migrants between countries. In parallel, individual human capital characteristics increase the likely rate of remuneration or the probability of employment in the destination relative to the sending country (e.g. education, experience, training, language skills). Thus, personal traits may contribute to an

increase regarding the likelihood of international movement, other things being equal.

Massey et al. (1993) contributed to the new economics of migration by introducing the network theory. They provided an entirely new concept, in which there is a distinction between individual decision making, on the one hand, and household or family decision making, on the other. Sociological studies have frequently found that migration decisions are taken in social units, such as the family, extended families, etc. (Faist, 1997, p. 191). As Massey explained, migrant networks are sets of interpersonal ties that connect migrants, former migrants, and non-migrants in origin and destination areas through ties of kinship, friendship, and shared community origin (1994, p. 28). The existence of these ties is hypothesised to increase the likelihood of emigration by lowering the costs, raising the benefits, and mitigating the risks of international movement. Network connections constitute a valuable form of social capital that people draw upon to gain access to foreign employment and high wages. Charles Tilly (1990) contended that “networks migrate” (p. 84), by which he meant that the network rather than the individual is the correct unit of analysis. “In the end, the network can sustain substantial migratory flows even when economic conditions would suggest that migration should either be declining or cease altogether” (Faist & Kivisto, 2010). In brief, families, households, or other defined units of production and consumption, not the autonomous individual, are the appropriate units of analysis for migration research. A wage differential is not a necessary condition for international migration to occur; households might have strong incentives to diversify risks or accumulate capital through transnational movement even in the absence of wage differences. Lastly, to put it brief, the general systems theory has shown how prestige and power can play a significant role.

#### 1.3.7 Current migration trends in the EU and Intra-EU labour migration and their determinants: A literature review

The major theories of international migration and their determinants have been presented. The following paragraphs will provide a literature review on intra-EU migration.

A survey of the literature on intra-EU migration reveals a particular predominance, whereby most research studies have addressed the results of EU enlargement, especially with regard to the addition of the 12 accession countries from the years 2004 and 2007<sup>11</sup> mainly from the East. The researches largely comprise studies that either attempt to provide predictions about the expected migration propensity from Eastern EU pre- and post enlargement<sup>12</sup> (e.g. Fassmann and Hintermann, 1997; Krieger et al., 2003; Boeri & Brückner, 2001) or that seek to find out the underlying causes and determinants leading to the massive labour movements immediately after the enlargements (e.g. Heinz & Warmedinger, 2006; Kahanec & Zimmermann, 2010). Regarding which, in relation to the 2004 and 2007 enlargements, which are considered as the most significant in the history of the European Union, the mass migrations from East to West Europe have primarily been explained by economic variables, such as the wage and income differentials, GDP differences or the probability of employment. As proposed in the neoclassical theory, the proposition of these studies is that income differentials play a substantial role in functioning as a stimulator to move. Next, some of the extant studies are briefly outlined and it is demonstrated how economic determinants are used to explain labour movement in the EU and how the theories are employed in the studies to explain migration.

Heinz and Warmedinger (2006) produced extensive research on labour mobility, which exclusively addressed the Eastern-EU enlargement, with the focus being on the key 'economic' determinants of labour migration in the EU. In their analysis, they examined wage and income differentials and elicited that labour migration is positively related to these. The study affirmed that both the absolute wage gap as well as the absolute gap in per capita income was high between the EU-8<sup>13</sup> and the EU-15<sup>14</sup> in 2004. To exemplify this, wage levels converted at market exchange rates ranged between 54% of the EU-15 average in Slovenia, to only around 17% in

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<sup>11</sup> The 2004 accession countries were the Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia (EU25). The EU was joined by Rumania and Bulgaria in 2007 (EU27)

<sup>12</sup> The majority of the forecasts of East-West migration are based on econometric estimates of macro migration models, which explain migration flows or migration stocks by economic variables, such as the income differential as well as the (un-) employment rates in the sending and receiving countries. Although most studies employ the same set of explanatory variables, the estimates of the parameters and hence, the migration predictions differ considerably in the literature (Boeri and Brückner, 2001).

<sup>13</sup> The EU-8 are the 2004 accession countries except Malta and Cyprus

<sup>14</sup> EU member states up to 2004



Latvia and Lithuania in that year (Heinz and Warmedinger, 2006). Despite the literature on the economic determinants of labour migration not offering a consensus on the most accurate measure for wages, most employ wage levels converted at PPP (purchasing power parity) as the most appropriate indicator, as “this measure accounts for differences in price levels in the home and host countries” (Heinz & Warmedinger, 2006, p. 16). At PPP exchange rates, the degree of wage convergence is larger, with 34% for Latvia and 35% for Lithuania. However, according to Heinz and Warmedinger (2006), the difference is still substantial, thus suggesting a large labour migration potential. In order to substantiate their findings, they further looked at the absolute gap in per capita income levels in 2005, eliciting that PPP ranged from 44% of the EU-15 average in Latvia to 74% in Slovenia. The mass migrations immediately after the enlargement, combining the new with the old member countries, thus can be ascribed to the economic differentials between the old and the new member countries (Heinz and Warmedinger, 2006).

Similar findings are shared in a study by Galgoczi et al. (2009), also in the context of the post-enlargement, who scrutinized the main macro drivers responsible for labour migration, namely, wage and income differentials. In their paper, they outlined the macroeconomic indicators for A8 and EU 15 for the time before and after enlargement. The outcomes of their study confirmed Heinz & Warmedinger’s (2006) findings, namely, that the wage gap between the accession countries and the EU-15 was very wide prior to enlargement (especially when calculated at market exchange rates), thus functioning as an important migration driver (Galgoczi et al., 2009). They argue that basically, with the eastern enlargement in 2004, diversity within the EU in terms of GDP per capita and wage levels grew enormously (Galgoczi et al., 2009, p. 15). According to their findings, when GDP per capita levels were measured at PPP, they ranged from 38.8 per cent (Latvia) to 73.6 per cent (Slovenia) of the EU-15 average in 2003 (the year before accession). The average wage in Latvia, the poorest among the A8 countries, was just one eighth of the EU-15 average in 2003 and hence, the statistics seemed to justify the fears of mass migration, if free movement of labour was permitted. Their conclusion was that if they “were to ignore geographical, cultural and political factors”, it would be fair to assume that on the basis of these macroeconomic drivers alone then a substantial (but declining)

propensity to migrate from the new to the old member states would occur (Galgoczi et al., 2009).

The significant differences of wages and their positive effects on the mobility levels of EU citizens are supported by further various studies, thereby confirming wealth differences as an important driver. Tassinopoulos and Werner (2009) noted that two decades ago the wage ratios between the then richer countries in the northern member states of the European Union, such as Germany and France and the poorer ones in the south, such as Spain, Portugal and Greece, were around 6 to 1, whereas this stands at 3 to 1 nowadays (Tassinopoulos & Werner, 2009, p. 7-8). In Maddison's study (1995), it was contended that the income gap between the Southern and the Northern European countries in the 1960s (i.e. during the period of intensive guest worker recruitment in Germany, France) was "similar to the gap between the EU-15 and the accession countries" (Maddison, 1995). Looking retrospectively at the history of labour migration, the less developed states in the south of the European Union constituted an eminent source of labour migrants; serving as sending countries (see for example Salt & Clout, 1976). Spain, Portugal and Greece were prominent sources of labourers exposing considerably high numbers of labour migrants. Their economies have experienced convergence<sup>15</sup> (to some extent) (Layard et al., 1992; Bauer and Zimmermann, 1999) and the numbers of labour migrants from the southern countries has been decreasing in recent years. Zaiceva (2008) confirmed that GDP differences result in migration and that a gross income advantage of the receiving country over the sending country is a pull factor, whereas individuals in higher GDP countries are less willing to migrate (Zaiceva, 2008). Zaiceva (2008), Galgoczi (2009) and Boeri and Bruckner (2001), moreover, found evidence that when the income differentials between the sending and receiving countries become smaller, potential emigration is negatively affected. As put forward by Alvarez (2003), the income gap between the EU and the accession candidates

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<sup>15</sup> Kahanec (2009) went one step further and looked at convergence levels, discovering that this took place regarding the new accession countries, with a subsequent decrease in migration.

<sup>17</sup> Further studies that advocate the same view are Piracha & Vickerman (2002); Pedersen et al. (2004); Alvarez-Plata et al. (2003); Boeri and Brücker (2005); Zaiceva and Zimmermann (2008); Fassmann and Hintermann (1997); Krieger (2004); Zaiceva (2006).

from Central and Eastern Europe is hardly a new phenomenon compared to other migration episodes in Europe after World War II. The above studies are only a few examples of a broad strand of literature <sup>16</sup> affirming that macroeconomic determinants, as in the neoclassical theory, are explanatory regarding the pattern of migration flows in the history of European labour migration.

Hence, the preliminary conclusion that can be drawn is that, as evident by the presented studies, at the time of the accession of the new member countries, there always existed considerable economic differences (such as wage or income level differences) between the old and the new acceding member countries. Consequently, immediately after the accession, there were mass migration flows recorded from the newer to the older EU member countries. The occurrence of massive migration flows is often observed after an enlargement, such as after the accessions of Spain and Portugal in the 80s and particularly, in the case of the eastern enlargement in 2004/2007. These highly significant labour migration streams are explained in the literature on the basis of the neoclassical theory. In addition, the migration streams have followed a clear direction, namely, from the southern or Mediterranean parts to the mid-European countries and never vice versa.

Despite the abundant studies on migration within Europe on the (macro-) economic determinants, the conceptualisation of the neoclassical theory has been subject to severe criticism. That is, the simple wage-movement explanation has been considered far from satisfactory in explaining the phenomenon of migration by many scholars (Nugent, 2003; Rosamond, 2000). In particular, it can be said that it has been critiqued for being insufficient in explaining the cause of the low labour mobility levels within Europe. Regarding which, Lalonde and Topel (1997) stated that “wage differential in reality as noted by Ravenstein (1986) does not provide the only reason for migration. Sometimes migration fails to occur even in the presence of substantial earning differentials” (pp. 805-80). Developments in the field of transnationalism led scholars to arguing that simply placing emphasis on economic motivations is no longer sufficient to give the full picture (e.g. Lewer et al., 2009). For instance, the extant theories are unable to explain the low, but still significant, migration between the wealthy EU member countries. In response to this, in addition

to analysis on migration inherent to macroeconomic variables, there is a growing strand of literature that seeks to explain labour migration by integrating socioeconomic factors, some of which is briefly discussed below.

Van Wissen and Visser (1998) analysed the causes of international migration between 16 Member States of the EEA (15 EU Member States and Norway) by testing economic and social network hypotheses in relation to international migration. Using the data on gross migration flows between those countries, the authors found that economic factors, such as the difference in GDP and unemployment rates, in contrast to the preceding studies, have no significant influence on the size of migration flows between the countries of the EEA. In their analysis of intra- EEA migration flows, these authors showed that the variables indicating past migratory movements are very important for the predictions of future flows. That is, their argumentation goes along the lines that network effects are responsible for the movement within the EEA area (Van Wissen and Visser, 1998). The presence of network effects for these states is also supported by Sprenger's (2013) study. Belot and Ederveen (2011), additionally, argue that the cultural approach works better in explaining migration patterns between developed countries than the traditional economic approach. They complied with the view that traditional economic variables, such as income and unemployment differentials alone, provide little explanation for migration patterns in general. Their study involved using a data panel of 22 OECD countries over the period 1990–2003 to investigate the role of cultural, demographic and economic determinants of international migration as well as the role of social networks in explaining mobility patterns between the countries. Specifically related to the EU, the authors showed that in case of the EU-15, cultural variables play a fundamental role and economic variables alone are not sufficient to explain migration in this region. Likewise, within the framework of the Eurobarometer 2007, EU15 and EU12 member states were asked in a comprehensive survey, which factors would influence the decisions to move. When asked “What are the factors encouraging a future move”, according to the survey, income related motivations were especially strong in the New Member States (EU12). Almost 60% of past movers in these states changed their location as a result of job related reasons, whereas only about 40% of the movers in the EU-15 mentioned the job factor. In a different interpretation, more than four in five respondents in the New Member

States claimed that work and income related factors could encourage them to move in the future. This answer is given only by one in two EU-15 citizens and the prevalent answers that were responsible for the movements of these citizens, were factors such as ‘social network’ or ‘housing and local environment’. These two factors were in comparison less relevant to EU citizens from the EU12 member states (Bonin et al., 2008, p. 71).

The majority of intra-EU migration studies are dedicated to the exploration of the determinants to migration. The exploration of the literature has revealed how there exist no migration theory or framework, which explains the lower, but still significant levels of mobility, namely those between the wealthier regions. Where large streams of migration are explained, e.g. on the basis of the neoclassical theory, such a migration framework is missing when scrutinizing mobility the older EU member states, although the reasons behind the determinants are stated in some of the researches, such as e.g. ‘friends’. This may be due to the fact that as these mobility levels are perceived as ‘low’ or close to inexistent, which will be discussed more in detail in the forthcoming chapters. This research study will address this gap.

### 1.3.8 Defining migration, mobility, and movement of workers within the EU

Before turning to the discussion of the theories of migration, the next sections contain an overview the various definitions of migration and migrants. According to the Oxford English Dictionary, the term migration refers to the process of “movement of people to a new area or country in order to find work or better living conditions”,<sup>17</sup> and a migrant is defined as “a person that travels to a different country or place, often in order to find work”.<sup>18</sup> Based on this interpretation, the act of moving is inherently linked to ‘finding work’; specifying movement for the purpose of ‘work’. UNESCO relies on the interpretation provided by the council of Europe, which states that a migrant is ‘any person who lives temporarily or permanently in a country where he or she was not born, and has acquired some significant social ties to this country.’<sup>19</sup> Another highly relevant source for the

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<sup>17</sup><http://www.oxforddictionaries.com/definition/english/migration> (accessed November 2015)

<sup>18</sup><http://dictionary.cambridge.org/dictionary/english/migrant> (accessed November 2015)

<sup>19</sup> <http://www.unesco.org/new/en/social-and-human-sciences/themes/international-migration/glossary/migrant/>

definition of the term is the UN Convention on the Rights of Migrants, which defines a migrant worker as a person “who is to be engaged, is engaged or has been engaged in a remunerated activity in a State of which he or she is not a national”.<sup>20</sup> It further notes that ‘the term ‘migrant’ in article 1.1 (a) “should be understood as covering all cases where the decision to migrate is taken freely by the individual concerned, for reasons of ‘personal convenience’ and without intervention of an external compelling factor”.<sup>2</sup> In both of the latter definitions, the status of a migrant is unrelated to ‘finding work’ or ‘employment’. Internal migration refers to the movement from one area (a province, district or municipality) to another *within* one country, whereas international migration is a territorial relocation of people between nation states. Moreover, the most common forms of migration can be distinguished according to the motives (economic, family reunion, refugees) or legal status (irregular migration, controlled emigration/immigration, free emigration/immigration, voluntary or involuntary migration). Most countries distinguish between a number of categories in their migration policies and statistics. The multitude of the existing variations between countries indicates that there are no objective definitions of migration.

What follows is one categorisation of international migrants. ‘Irregular migrants’ (or undocumented / illegal migrants) are individuals who enter a country, usually in search of employment, without the necessary documents and permits. ‘Forced migration’ refers not only to refugees and asylum seekers, but also to people forced to move due to external factors, such as environmental catastrophes or development projects. ‘Family members’ (or family reunion / family reunification migrants) are people sharing family ties joining people who have already entered an immigration country under one of the abovementioned categories. In the history of EU migration, the most prominent examples of family reunion are the family members of the guestworker schemes in the 1970s from EU member states and third country nationals. The large numbers of the latter initially led to a halt in the recruitment of guestworkers and subsequently the influx of non - EU migrants tailed off in the 1980s owing to legislation restricting their numbers. Whilst many countries recognise the right to family reunion for legal migrants, others, especially those with

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<sup>20</sup> For a broader definition see: <http://www.unesco.org/new/en/social-and-human-sciences/themes/international-migration/glossary/migrant/>

contract labour systems, deny this right. 'Return migrants' are those people who return to their countries of origin after a period in another country.<sup>21</sup> An economic migrant is someone who emigrates from one region to another to seek an improvement in living standards, because the living conditions or job opportunities in his/her own region are not stable (Oxford English Dictionary). The United Nations uses the term migrant worker.<sup>22</sup> Social migration is the counterpart to economic migration and is less clearly defined or straightforward than economic migration. However, generally, under social migration any type of economic related activity is excluded and the main attraction of interest is the 'quality of life' as opposed to 'standard of life'. The improvement of quality of life can relate to various factors, such as the endowment of more free time, the proximity to social circles, such as family and friends, or the social attractions of e.g. a large city. Social migration is similar to lifestyle migration, though not exactly the same, for the latter is defined as a "relatively affluent individuals moving (...) to places which, for various reasons, signify for the migrants something loosely defined as quality of life" (Benson & O'Reilly, 2009, p. 621). They are people who have made a conscious choice not only about how to live, but also about where to live (Hoey, 2005). Whilst the lifestyle orientations and motivations of these migrants might differ, perhaps the one unifying factor of this group is their belief that a change of residential place will lead not simply to better opportunities in life, but rather to something that might be described as a better lifestyle and/or a more fulfilling way of life. One important characteristic that distinguishes social migrants from the profile of lifestyle ones is that "Lifestyle migrants can be any age, but they tend, on average, to be older and many are retired or semi-retired. They sometimes move permanently and sometimes only semi-permanently, to their new, or second, home." (Benson & O'Reilly 2009. (They are not tourists though).

For this research study, the migrants of interest are economic and social ones under the umbrella of 'labour migrants' as will become apparent in the forthcoming chapters. In a recent report, the EU chose to treat the terms 'mobility' and

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<sup>21</sup> For more on this, see International migration at the beginning of the twenty-first century, *International Social Science Journal*, Vol. 165 (Castles 2000).

<sup>22</sup> ("United Nations Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families". United Nations. Retrieved December 29, 2014.)

‘migration’ interchangeably, although in the EU policy context, mobility often refers to movements within the EU and migration to movements between EU and non-EU countries. “Mobility across the EU has been increasing over the past two decades, as measured by the share of EU population born in a different EU country. The increase is particularly evident when looking at data for the post-enlargement EU” (EU Commission, 2015). Whether temporary mobility or long-term migration, skilled or unskilled; the EU uses both words interchangeably.

In the datasets, the definitions of ‘migrant’ can differ according to the analyses, e.g. in terms of country of birth of nationality, or length of stay. In its analyses of migration flows into and out of Britain, the Office for National Statistics (ONS) uses the UN definition of ‘long-term international migrant’: “A person who moves to a country other than that of his or her usual residence for a period of at least a year [...] so that the country of destination effectively becomes his or her new country of usual residence”. The main source of data on this is the International Passenger Survey (IPS), which is in turn the basis for ONS estimates of net migration. No other dataset presently available in the UK measures migration by the UN/ONS definition. Thus, other counts inevitably include people who live in the UK for less than 12 months, and do not qualify as migrants by this standard. In this study, it was ensured that all the ‘movers’ were qualified as ‘migrants’, i.e. those people who had been in the UK for more than 12 months. The definition of ‘migrant’ is not simply a technical problem, for it has an important effect on migration data and the analysis generated from such data. This in turn has an impact on public understanding and on policy debates. In this research the statistics are used just for descriptive purposes, as the main focus is on scrutinising the motivations prior to the decision-making process to migrate according to regional differences.

#### *1.3.8.1 The use of the terms migration and mobility within the EU context*

For clarification purposes, a brief remark on the terms migration and mobility is considered to be useful at this point, as it will help to avoid possible misunderstandings during the course of the presenting research. Within the concept of free movement in the EU, the most common terms describing the act of movement in conjunction with work (in order to work) are the two terms migration and mobility. The various categories of people that can be associated with the term



‘migration’ have been described above. But what about ‘mobility’, which is the other predominant word used in studies relating to the free movement of people in the EU? According to the Oxford English Dictionary, mobility, as opposed to migration, refers to “the ability to move or be moved freely and easily” and also, “the ability to move between different levels in society or employment”.<sup>23</sup> When comparing this with migration, the terminology focuses on the ‘ease’ to move and secondly, on the movement ‘between employment’. ‘Movement between employment’, and moving in order to work as in migration, might not pertain to the same purpose for movement and could easily describe two fundamentally different actions owing to different motives. The differentiation and interpretation of these two terminologies are highly significant for this research, as a misconception of the two different concepts of movement can influence the hypothesis and the research question outcomes and thus, there needs to be clarification before proceeding further. In this research it is proposed that both terminologies can be used interchangeably, as ultimately, both, mobility and migration are driven by an underpinning motivation. Also, in this thesis it is argued that the EU Institutes are in search of ways to ‘increase’ the mobility levels, i.e. they do not merely wish to ease or facilitate mobility, as one of the interpretations in the Oxford English Dictionary puts it. That is, they seek ‘higher’ mobility levels (regardless of whether high mobility levels an end in itself or as a means to another end). Easing movement, and increasing movement are not quite the same. By lowering the barriers, the EU Commission is not only trying to ‘facilitate’ movement, for more than that, it clearly states that the main object (particularly after the introduction of the SEM) is to ‘increase’ mobility levels.

After having analysed a large strand on literature on intra-EU migration, it emerges that studies referring to labour movement within the mid-European member states predominantly use the term ‘mobility’ in relation to highly skilled and business migrants. These are often people with qualifications as managers, executives, professionals, technicians or similar, who move within the internal labour markets of transnational corporations and international organisations, or who seek employment through international labour markets that are searching for scarce skills. Many

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<sup>23</sup> <http://www.oxforddictionaries.com/definition/english/mobility> (accessed November 2015)

countries welcome such migrants and have special 'skilled and business migration' programmes to encourage them to come. Labour migration, on the other hand, is almost exclusively used to describe the massive streams of labour migrants from the new accession countries (the Eastern EU countries). It is noticeable that there has been a change in the terminology regarding the integration process and accordingly, in the language used by the EU. For, whereas once everything referred to the 'free movement of workers', more recently, the discourse has changed to intra-EU migration / labour mobility or even mobility 'levels'.

#### 1.4 Conclusion

According to the theories of migration, the reasons behind the movement of individuals are based on manifold determinants and there are a variety of theories that have attempted to explain this complex phenomenon. The mass migrations from east to west Europe as a result of the enlargement have been explained based on macro economic factors and on the premises of the neoclassical theory of migration. According to the latter, wage differentials are the explanatory variables for the movement of people and this is, undoubtedly, the most popular narrative in EU migration studies. However, the movement of EU citizens between converged regions has not been well researched. In the literature, this is considered as 'low' in volume, which could explain the lack of the theories regarding this type of migration. The current research is salient in this regard as it takes into account the level of convergence between certain countries when investigating the motivations underpinning migration. It involves, firstly, seeing the findings from the extant research can be corroborated via the use of qualitative data, given that most investigations have employed quantitative analysis. Further, through the use qualitative interviews, the aim is to test the importance of social determinants and whether or not and if so, to what extent they are applicable. To the best of this researcher's knowledge, there is no literature that has focused on the social determinants of Polish labour migrants. Moreover, the migration theories are also tested on a German sample for this work. The extant studies pertaining to Europe have primarily focused on explaining mass migration in the context of wealth differentials. As a consequence, the theories are incapable of explicating why low

level migration occurs between countries with high levels of convergence and hence, one of the key aims of the current research is to address this gap.

## **Chapter 2 Placing the concept of ‘free movement of workers in the EU’ in context: Intra-EU migration and labour mobility in the EU**

### **2.1 The emergence of the concept of free movement of workers in the EU: The first blueprints**

Before commencing with the exposition of the subject matter, this section, firstly, provides an explanation regarding the historical concept of the free movement of workers in the EU and reasons behind the creation of the concept of free workers. The roots of the rationale of ‘free movement of workers’ are deeply entrenched in the very principal constitutional form of the EU and thus, present a highly fundamental, even quintessential component within the conceptualisation of the European Union framework. A profound exploration of its historical origins reveals how the concept of free movement of workers had a decision-making effect on the establishment of the European Union in its nascent years when the EU became an official institution. Nowadays, the idea of free movement is usually taken for granted as an essential element regarding what is understood as being an economic Union today, without questioning its benefits. The free circulation of people in integrated unions, however, was introduced initially for very specific reasons.

In the history of the European Union, ‘free movement’ was officially proclaimed for the first time at the Hague Congress in 1948,<sup>24</sup> the first federal movement of European history. The congress brought together representatives from across a broad political spectrum<sup>25</sup> and was assembled in order to discuss the establishment of a European political co-operation, with the principal motivation being to ensure diplomatic as well as economic stability in Western Europe after the Second World War. The outcomes of the congress lead to the formal establishment of the first supranational institution of the European Union, the European Coal and Steel Community (ECSC). The Treaty of Paris was signed in 1951 between France, West Germany, Italy and the three Benelux countries Belgium, Luxembourg and the Netherlands, which formally established the ECSC and came into force the year after, in 1952. In order to ensure the economic ties, its main actors, France and

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<sup>24</sup> Alpert (1951)

<sup>25</sup> The Congress brought together 713 delegates from 13 countries

Germany, who were previously arch enemies during the war, now agreed to share the production of coal and steel. The most effective way to achieve this would be by pooling together their regional economies and by allowing workers in this industry to move freely between the member states.<sup>26</sup> Henceforth, the first version of ‘free movement of workers in the EU’ was born and one can, thus, argue that this legal conceptualisation of ‘free movement’ played a highly crucial role when establishing the EU.

Back then, the host countries were very sensitive when it came to the selection process and acquisition of their workers. Special regulations were applied, e.g. the workers were not allowed to receive benefits or were expected to return once the work ‘was done’ (Mei, 2003).<sup>27</sup> The recipient countries were well aware of potential high levels of influx of migrant workers from the economically weaker countries. Free movement, hence, was a carefully ‘controlled’ process in the initial phases of the EU and depended purely on the needs of the recipient countries.

The contextual revision of free movement of workers with the signing of the Treaty of Rome in March 1957 added a new dimension to its conceptualisation.<sup>28</sup> It prescribed the implementation of a common market of goods, workers, services and capital<sup>29</sup> within the EEC's member states as well as a progressive reduction of customs duties and the establishment of a customs union,<sup>30</sup> which brought a significant change to the notion of ‘free movement’. The most significant underlying difference between the Treaty of Paris in 1952 and the Treaty of Rome in 1957 in

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<sup>26</sup> The Treaty of Paris prescribed that this only allowed for coal and mine workers to move freely. Others were excluded from this privilege.

<sup>27</sup> In fact, the immigration of labour was controlled fiercely by the EU member states and the labour force was acquisitioned only on the basis of needs and under strict regulations, i.e. foreign workers were invited merely to fill the job vacancies for which no national workers were available; they were not entitled to bring their family members and after the ‘job had been done’ the workers were supposed to return to their country of origin. They were not entitled to receive social benefits etc. (MEi, 2003)

<sup>28</sup> It was signed on 25 March 1957 by Belgium, France, Italy, Luxembourg, the Netherlands and West Germany. The word *Economic* was deleted from the treaty's name by the Maastricht Treaty in 1993 and it was repackaged as the *Treaty on the functioning of the European Union* with the coming into force of the Treaty of Lisbon in 2009. According to article one of the current Treaty of Maastricht, the European Union is the successor of the European Community.

<sup>29</sup> The SEM was ought to be completed by the end of 1992.

<sup>30</sup> More renewals that came with the Treaty of Rome, such as the creation of common transport and agriculture policies and a European social fund, can be read about at [europe.eu](http://europe.eu).

relation to free movement was that with the introduction of the new treaty, the right to move freely was further expanded at the EU level (originally Article 48, now Article 45 TFEU). In other words, the right of free movement was no longer limited to coal and mine workers, for it was now granted to all nationals of the EU member states and to all categories of work.

A major reason why community law advocates free circulation is grounded on an economic explanation, and is often referred to the Spaak report. The Spaak Report or Brussels Report on the General Common Market is the report drafted by the Spaak Committee in 1956. It concluded that a sector-by-sector integration of the European economies would be difficult and instead, a horizontal integration of the economy by the gradual elimination of trade barriers was considered as being more beneficial. The intended way to achieve this specific goal was by creating a customs union. The report was based on macroeconomic theories and demonstrated that integration of national markets could be best achieved if both products (goods, services) and production factors (labour, capital) could move freely across member states. Consequently, it was decided that Article 48, which prescribed the free movement of workers in the EU, had to be included in the EU Treaty so that free circulation of the production of factor 'labour', i.e. the free movement of workers, would be enabled.

Another 'active' contributor to the establishment of the free passage of workers was Italy. It had a profound interest in introducing free movement for workers, seeing it as a means to solving its unemployment problem and thus, it pressurised the remaining EU member states to agree to a political compromise that included workers' free movement (e.g. Romero 1993, Mei 2003). In today's EU, the high numbers of south-north labour migrants after the EU crisis as a result of high unemployment in Portugal and Spain are a repetition of this history. The only difference is that the borders for their workers are already open. Back then, the other member states were rather reluctant to the idea of free circulation of workers (let alone high mobility levels), for as Mei (2003) noted in his work:

It does not seem very likely that the Member States which signed and ratified the EEC Treaty ever intended to translate the theoretical notion of a free factor mobility into practical reality. In fact, when they included Article 39 in

the Treaty, the six States did not seem to have had any theoretical notion in mind. Probably, Article 39 was not much more than the product of a political compromise, which implied that ‘the five’ would gradually soak up the Italian labour surplus during a transitional period of twelve years (p. 25).

Mei (2003) confirmed that the member states “feared free labour mobility; and that a liberalization of labour market admission rules ran counter to the interests of most States” (Mei, 2003, p. 23). Patently, the majority of the member states held the view that labour mobility should continue to be determined by the needs of the national labour markets only (Mei, 2003). From a supranational perspective, this view rather counters the idea of the EU Institutions on free movement of workers today.

Regarding the long-term perspective, the EU advocates free and unregulated movement for all workers within the borders of the EU, who are citizens of the union. What has changed, however, is the view on the numbers of people, particularly within the converged regions. The idea today of the EU Institutions is far from what they had in mind in relation to labour mobility at the beginning of the EU. Whereas at that time, facilitating workers movement so as to meet the needs of the labour markets’ was the main objective, which was a carefully and monitored approach, today, the EU Institutions aspire to complete free circulation and not just merely according to the needs of the labour markets. Moreover, the main agenda is based on the idea of ‘increasing’ mobility levels (in order to make the EU labour market more competitive), which can be said to be a relatively new concept in the European Union. Before the Single European Act of 1986, the aspiration for ‘higher’ mobility levels (due to economic reasons) was not really emphasised or highlighted. Despite the Spaak report advocating free movement for economic benefits, the economic benefits of labour mobility have never been assessed in terms of whether high or low levels of mobility are more desirable, i.e. whether there is an optimal level. Instead, the main idea was that free circulation would simply be beneficial, as opposed to no circulation at all.

To summarise, the very first version of the concept of free movement, the free movement of workers, was regarded primarily as an economic activity and played a crucial role in enabling steel and coalmine workers to move freely. The economic benefits envisaged were that it would allow for a controlled level of movement for a

specific purpose and within a limited sector of workers, for the sake of increasing economic strength in the EU. This vision led to the creation of today's EU's forerunner, the ECSC and the free movement of this sector eventually led to it being extended to all other sectors. However, the nature of the concept of free movement of workers within the EU has changed gradually. Born out of the idea of economic reconstruction and political stabilisation through the free circulation of mine and coal workers, it was decided that free movement should be granted as a fundamental right for all workers within the borders of the EU and this was set out in the Treaty of Rome in 1957. However, increasing mobility levels or seeking high levels of mobility was not on the agenda at that time. It was only after the introduction of the SEM, when these issues gained more attention and ideas about mobility levels changed, as is shown next.

## **2.2 The Single European Market: The revival of integration and liberalisation of the labour markets**

The focus now moves on to the practical side of migration and mobility and their implementation in the EU. With the introduction of the Single European Market, the concept of free movement of workers experienced a watershed. This section discusses free movement as part of the rejuvenation process of integration in the EU. It, in particular, underlines how, with the introduction of the SEM in the 1980s and the removal of internal barriers, labour mobility regained immense importance and it is explained why this is the case. 'Free movement of workers' was laid out in the Treaty of Rome of 1957 as one of the core pillars for the first time; however, this was never fully accomplished until 1993. As a result of the oil crisis shock in the beginning of the 1980s, the EU experienced an economic slowdown and was facing economic collapse. The economy started to stagnate and was marked by outstandingly high levels of unemployment. This period, when the "EC lacked a clear vision about its future" (Jovanovic, 2013, p. 23) soon became known as that of 'Eurosclerosis', which referred to a halt in the European integration process. Evidently, the Treaty of Rome was not the ideal blueprint for the future of the EC anymore, especially as the effectiveness of the European Union was threatened with a loss of economic power to the US and Japan. The still excessive national non-tariff barriers, despite a tariff and quota-free market existing within the EC, were still



segmenting markets within the EC, thus jeopardising the ability of its manufacturing and services industries to profit fully from economies of scale. This was hindering their international competitiveness in relation to both the US and Japan, as well as newly industrialised countries outside the EC (Jovanovic, 2013). The only way of economic integration through tariffs and quotas on internal trade expired in 1968. The objective was to oust NTBs and create a genuine and homogenous frontier-free market, with the way to achieve this ideal being to free internal barriers within the EU area. This marks the main difference from the transition from the Treaty of Rome to the SEA/SEM. With the implementation of neoliberal policies and a freer market where capital, services, labour and people could move between the EU member states by removing physical, technical and fiscal barriers, the main intention was to increase the competitiveness of EC goods, services and factors in relation to the principal foreign rivals, though a change in internal rules, rather than subsidies. The EU was left with no choice other than introducing new strategies to revive the economy, which became even more evident with the oil crisis of the early 1970s. It was held that the pessimistic years should be brought to an end with the implementation of a Single European Market, which promised a liberalisation and unification of the factor markets (labour and capital) through mobility across the EU. From 1986, the year of the introduction of the Single European Act, until the establishment of a single market on 31 December 1992, is referred to in the literature as the era of “rejuvenation or the revival of the integration process” and involved “the biggest boost in the integration process” (Jovanovic, p. 26, 2013) in the history of the EU. The programme was widely accepted throughout all segments of the EC and represented the end of the lethargy and eurosclerosis. With the framing of the SEM – Europe’s new forceful tool to ensure deeper integration – labour mobility regained significance and has remained salient up until today. The Single European Union came along with four freedoms that were expected to boost the economy and increase the competitive quality of the EU: the free movement of goods, services, capital and labour (the principle of free movement of workers was extended to everyone with the Maastricht Treaty). From now on, the freedom of workers was not merely an existing paragraph in the Treaty with no further implications (as in the Treaty of Rome), but it became one of the priorities on the political agenda of the EU and was actively promoted.

While the free movement of labour was intended to support both cultural and economic development between the new member states and the old ones, initially, limitations did exist for those interested in migrating within the EU for labour purposes. As an example, from 1990-1993, the EU migrant was expected to be in at least part-time employment in the settlement location, which then allowed a five year right of abode that was renewable (Fevre, 1998). In 1993, with the Treaty of Maastricht, this limitation was removed, thereby allowing for a truly free movement of labour within the EU member states. This also included the European Free Trade Association (EFTA) immigrants as they were no longer required to register for a visa. In 1997, the Schengen Agreement (1985), which allowed completely free movement, devoid of any passport checks, between 13 of the 15 EU member states, not Ireland or the UK, was adopted in the Amsterdam Treaty. This treaty made the Schengen Agreement a part of EU law that new EU members would have to adopt. More recently, in 2004, the Free Movement Directive, the core legislation on free movement of labour in the EU, was constructed. This allows for the free movement of labour, but if the 'EU citizen' in question does not have a job or means of financial support in the destination country, then he/she must return migrate after three months and if he/she intends to stay beyond three months, then he/she could be required to register with the host member state. Under this scheme, it is difficult to track intra-EU migrants and it is equally difficult for the destination country to have them removed after the three month period.

### **2.3 Deepening integration 1: SEM and increased mobility levels – From free movement to high mobility levels**

This section probes the stance of European Union Institutions on labour mobility, i.e. inquiring into the 'type' that the EU Commission wants. As it will become apparent, the key issue is less about whether labour mobility leads to more (social) cohesion and more the other way around, i.e. what leads to labour mobility in 'converged' and converging regions. Once the Single Market was implemented in 1992, the movement of workers regained focus and became an important matter on the policy agenda of the EU. It was not about 'enabling' or facilitating mobility anymore, for the Commission was interested in increasing mobility levels. Since then, with the deeper cohesion and integration through the liberalisation of the markets and the

reduction of barriers, the view that ‘higher’ mobility levels equates with a more competitive Union has come increasingly to the fore. In the last few years, a new strand of literature has emerged which intensely discusses ‘low’ mobility levels in the EU. Generally, the fundamental rationale behind the free movement of labour is that it would allow supplies of labour to move where a demand for labour exists as well as creating social cohesion amongst the EU member states (Fevre, 1998, European Commission 2002).

To achieve higher mobility, in 2011, the EU Commission introduced the Single Market Act I (and adopted a second Act in 2012). The completion of the Single Market is a continuous exercise and constitutes a central element of the European growth agenda, thus requiring permanent attention and adaptations. In the 12 layers that identify the priorities for a strong highly competitive social market economy, point 2.2 is fully dedicated to the mobility of workers, stating the following:

Mobility and workers' qualifications respond to the need to re-launch growth in Europe. Increased mobility of skilled labour will make the European economy become more competitive. Too many regulatory barriers still prevent Europeans from working wherever they wish in the European Union, whilst many highly skilled jobs remain unfilled.

As pointed out above, not only does the EU want to facilitate or simply easy mobility for the sake of the EU citizen, for it is also seeking “higher” mobility levels in order to make the European economy become more competitive. According to the SMA (2011), “too many regulatory barriers still prevent Europeans from working wherever they wish”, which include language barriers, cultural barriers, lack of available information, legal and administrative obstacles, failure to recognise diplomas, heterogeneity of tax and social systems, accommodation barriers (tax treatment, affordability, eligibility for low-cost rental housing, etc.) and a lack of transport infrastructure (e.g. in Broyer et al., 2011; Janiak & Wasmer, 2008; Zimmermann, 2009). The common argument is that these factors prevent mobility.

However, this stance could be too simplistic to explain intra-EU migration, especially when recognising that the decision-making process to migrate can be a complex process combining a multitude of factors, where the importance of such

barriers might be outweighed by other motivational factors. To argue simplistically that to be “mobile” is dependent on barriers, can mean that these are the only determinant of migration. So, if the barriers were removed, would mobility levels then increase? Barriers, thus need testing against the determinants of migration in order to find out their influence on the decision making process and hence, elicit whether or not they prevent movement. Moreover, how are the high mobility levels of the East-West migrants explicable if there are administrative and cultural barriers to accessing the labour markets?

The Single Market Act I was soon followed by the Single Market Act II in 2012, which concentrated the 12 layers into four main points, with labour mobility being labelled as one ‘the drivers of growth’, thus being promoted as a key aim of the EU. This represented a new chapter in the process towards a deeper and better-integrated single market. As aforementioned, the completion of the single market is a continuous exercise, and this is why even after more than 20 years of the SEM, its quintessential components, the four freedoms are still important fostering growth and employment. Mobility of labour, or increased mobility is equated with being a catalyst for economic growth/promotion of competitiveness in the EU, which explains its importance.

The Commission’s efforts to achieve higher circulation of workers are addressed in numerous other official EU technical reports, published by them, which underlines the seriousness of its efforts. For instance, in the proposal titled ‘REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL a European network of Employment Services, workers' access to mobility services and the further integration of labour markets’, an official document that was forwarded to the Council as well as to the Parliament on the 17/01/2014, it states that “Mobility generates social and economic benefits. Increased intra-EU labour mobility will widen employment opportunities for workers and help employers fill job vacancies better and faster. This contributes to the development of a European labour market with a high level of employment (Article 9 TFEU).” According to the EU Commission, increased mobility levels are evidently regarded fundamentally as a good thing and the possible socioeconomic issues that could arise due to high mobility levels are not considered. The same document states “Intra-EU labour

mobility is relatively low when compared to the size of the labour market and the active population of the EU.” To provide further exemplification of its stance, a further document published on behalf of the EU Commission, under the title ‘Job creation, productivity, and more equality for sustained growth’, notes that the “EU suffers from low mobility levels”. The report states how there is evidence that the current levels “of mobility are below what could be expected from the EU as well as below the measured mobility intentions, especially as far as movements between euro-area Member States are concerned.”<sup>31</sup> In Mario Monti’s (2010) report, addressed to the President of the European Commission Jose Manuel Barroso, ‘A new strategy for the single market’, low mobility levels are highlighted as one of the key market shortcomings. The matter was also raised in the European Parliament through Louis Grech’s report ‘Delivering a single market to consumers and citizens’, subsequent to which an action plan was drawn up to “relaunch growth and strengthen confidence”.<sup>32</sup>

If the EU Commission was speaking of the mobility of high skilled labour, then it is noteworthy to mention that mobility or lack of high skilled labour is currently and has been for the last few years a global issue, and hence, not a specific problem limited to European territory. The idea of increased mobility levels is also generally supported in the academic literature. In one research study, Zimmerman (2008) looked into the causes of labour immobility in Europe. The research team found that the single largest cause was a lack of language skills, with other major causes being rising female labour market participation and less mobile double-income households, an increase in the homeownership rate, still existing barriers to the transferability of social security entitlements, insufficient recognition of formal qualifications, insufficient transparency of the European job market and online search engines, persistent long-term unemployment leading to increased relevance of social networks for the individual, and cultural barriers. The study identified a low European annual interstate mobility (1%) in comparison with the United States (3%) and Canada (2%). The following policies to minimise labour market friction at the national and the trans-national levels were suggested: (i) strengthening the institutional preconditions of mobility on the labour market, (ii) developing mobility-

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<sup>31</sup> European Commission (2013d)

<sup>32</sup> <http://register.consilium.europa.eu/doc/srv?l=EN&f=ST%209283%202011%20INIT>

friendly educational policies, (iii) creating effective information and social networks, (iv) easing mobility barriers stemming from the diversity of national social protection and qualification systems, and (v) extending the knowledge base as well as evaluating mobility-related policies. Zimmerman, among others appears to assume that mobility is a good thing and hence, does not consider the possible disadvantages of high levels. It is arguable whether the comparison of mobility levels to those of the USA or Canada is relevant, as the institutional structures are entirely different to those of the EU (whether political, economic, or possibly even social), especially with regards to factors such as language or a common currency.

In order to address the problem of low mobility levels “induced by the barriers” (European Commission, 2010), the Commission has undertaken various practical steps.

In 2011, it announced the formation of a ‘High Skilled Task Force’, which was installed to mandate and identify the main drivers and characteristics of the ‘new labour markets’, particularly focusing on skills and mobility (European Commission, 2011b). Then, in the Commission’s plan for Skills and Mobility’ (European Commission, 2002) from earlier, which built on the recommendations of the task force, information on qualifications and mobility was given a key role. Moreover, the introduction of the European Job Mobility Action Plan (adopted in 2007) and the announcement of the European Year of mobility, in 2006, followed. Both initiatives were launched to back up the strategies of worker mobility as part of the strategic priorities of the Lisbon Agenda in 2000, which failed to meet its target, namely to increase labour mobility.

On the practical level, the Commission made arrangements, such as the recognition of diplomas and professional qualifications at the European level, which should facilitate the comparison between national education systems whose structures differ considerably from one country to another. In principle, the goal was to extend the principle of automatic recognition of qualifications that would, in turn, facilitate or even stimulate the movement of workers, e.g. thanks to the establishment of a European Qualifications Framework,<sup>33</sup> the Europass,<sup>34</sup> or the creation of a common

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<sup>33</sup> Which allows for comparison of the qualifications issued by the various European education and training systems; applying to higher education and vocational training

structure for university training (bachelors/ masters, PhD) as part of the Bologna Process, or even the setting up of a European employment agency. Regarding the lattermost, the setting up of EURES (European Job Mobility Portal) <sup>10</sup> was celebrated as ‘a major step forward’ (European Commission 2010) as it placed national employment services in a network, thus partially overcoming the obstacles due to workers' lack of information.

The efficacy of the lowering of the barriers, however, is highly questionable. That is, despite the various initiatives at the different levels, the removal of the barriers has not led to any significant increase in mobility levels in Europe. Considering the statistics, without question, it can be said that all of the policy strategies have clearly been a failure: geographic mobility within the European Union has not increased (e.g. Zimmermann, 2011) at all or only minimally in recent years (EU Commission, 2014), if the mobility caused by divergence (unemployment; Portugal or wage differentials; Poland) is excluded. Although it is said that mobility in Europe is difficult to measure due to incomplete and contradictory data or shortage of transnational surveys, Bonin et al. (2008) provided some data in their study on European mobility. According to these authors, cross-border mobility in the EU-15 with regards to the population of the receiving country is 0.1% annually, whereas internally it is 1%. Broyer (2011) contended that only 2.3% of European citizens currently live in another EU member state (Broyer et al., 2011, p. 7). This low mobility at the aggregated level is ironic, because the great majority of European citizens consider that the free movement of people is the main achievement of European integration (Broyer et al., 2011, p. 7). Moreover, further weakening the barriers argument even more, the long-term predictions are that mobility levels in Europe will not increase, despite their removal (Janiak & Wasmer, 2008; Johns, 2009).

The EU recognised in a report that cyclical unemployment as well as GDP differentials lead to increased mobility rates (EU Commission, 2015). What follows from is that it has taken the view that people move due to unemployment and GDP differences. No significant increase of mobility levels is linked to removal of barriers in the reports of the EU, although it has been mentioned that mobility levels could

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<sup>34</sup> The single European framework for the recognition of qualifications and skills, established in 2004

have slightly increased in the last few years due to “social cohesion across the labour markets” (EU Commission, 2014). However, there is no evidence provided as to how the increased mobility levels have contributed to the cohesion of the labour markets or the other way around. It is worthwhile adding that in a speech by A. Laszio on divergence in the European Union at a Lecture at Helsinki University in 2014, the European Commissioner for Employment, Social Affairs and Inclusion, he stated that divergence has increased in the EU and possibly the rise in mobility levels can be attributed as the cause. What is clear is that the determinants of high levels of EU movers are based on divergence in wage or unemployment gaps rather than convergence. That is, deeper integration across labour markets has not, so far, resulted in substantial increases in migration.

Clearly, the aim of the Commission is to seek ‘higher’ or ‘increased’ mobility levels. While after the inauguration of the SEM, policy was introduced with aim of removing barriers to the functioning of a fully integrated market economy in Europe and improving the matching of labour supply with demand, more recently, the debates about intra-EU migration have shifted to the issue of ‘higher’ mobility levels. In the next section, mobility is considered from the perspective of the EU Institutions. The stance in regard to increasing mobility levels has reached a consensus and is well supported by a range of sources, including much of the academic literature. However, several decades after establishing the idea and legislation for a Single European Labour Market, academic experts and policy makers agree that this goal is far from being accomplished. In addition, in order to deliver a barrier-free zone, it is crucial to understand “why” mobility levels are not increasing, how the decision-making processes in relation to moving are influenced and what the real motivations to do so are.

## **2.4 Why free movement? The rationale behind the migration of workers**

One of the primary reasons and most prominent voices within the EU, why the (free) circulation of the workers should be promoted, is linked to idea of economic benefits that comes with it. In order to understand the use of labour mobility, it is helpful to acknowledge that in economics, *human capital* is known to be one of the ‘optimal



resources'<sup>35</sup>, as Simon Julian (1981) contended in his this book. This explains why China's strong role as a magnet in the global market for human capital will soon challenge the position of the United States, leaving it up to Europe to strengthen its strategy in accessing the 'ultimate resource' so as not to fall behind in the race of nations (Migration Policy Practice, 2014). In today's globalising context, the mobility of workers is inevitable. Global factors, such as climate change, natural disasters and the rise of the BIC countries (Brazil, India and China), pose additional challenges to the labour markets. Moreover, the rise in resources available to the developing world and the strong increase in human capital is inherently generating more opportunities for global mobility.

In the European Union, made up of integrated markets, labour mobility, like trade, is considered as 'welfare-enhancing', although there could be significant distributional effects. With the creation of a free single market, where barriers are removed and trade and capital of goods, as well as labour can circulate freely, the allocation of lattermost between countries can subsequently become more efficient. The improvement of the circulation of the factor labour through the elimination of barriers creates a balance between labour surpluses and shortages and leads to increased economic output, thus fostering growth. (Zimmermann 2005). The President of the Commission, Juncker, has also acknowledged the fact that free movement is a key pillar in the Union, and needs to be promoted in order to address labour shortages and skill mismatches. A summary on how labour, like trade, is welfare enhancing, has been provided by Ozden (2015).

Nevertheless, economic theorists do not have a consensus regarding whether factor mobility (in this context, the free movement of labour and capital) is a complement to or a substitute for free trade (the free movement of goods and services). Portes (2005) contended that "as in a standard Heckscher–Ohlin model, they are pure substitutes". Either free trade or factor mobility will increase the efficiency of resource allocation and will maximise overall welfare; it is not necessary to have

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<sup>35</sup> In his legendary 1981 book, the U.S. population economist Julian Simon claimed that humans and human capital are – in his words – "the ultimate resource". He was also a strong proponent of open and free labour markets. While Simon died much too young in 1998, his vision is still very much alive. Indeed, in this age of information and knowledge capitalism, human capital has become the key driver of economic growth. And - here is the important point to remember - it can be optimised globally through migration if and when it is well-conceptualised and not badly managed.

both, he argued, which supports the view that mobility is not required for enhanced welfare. He contended that capital mobility might, in some circumstances, be a substitute for labour mobility. However, in more recent, and arguably more realistic, trade models, the picture is much less clear (see Venables, 1999, for a review). Portes (2015) opined that so long as there are frictions, or increasing returns to scale, for example, free trade and factor mobility (of labour, capital or both) will have different impacts (normally both will increase welfare, although this is not necessarily the case, as it depends on the nature of the frictions). Also of note, is the fact that while the economic case may be strong in principle, other free trade areas (for example the North American Free Trade Area) or even customs unions do not typically involve the free movement of people. So, as Portes boldly argued, from a purely economic perspective, free movement was not a necessary part of the European project; it would have been possible to have a customs union and an integrated economic space without it. Hence, the decision to make it one of the founding principles was a political as well as an economic choice. That is, labour mobility was seen as complementary not just to the economic aspects of European integration, but also, to its wider political objectives, but the desirables levels were never specified. Nevertheless, the EU endorses labour mobility, as is demonstrated more clearly in what follows.

According to labour economics, labour mobility affects workers on two levels: the aggregate level and the personal level. Regarding the latter, increased labour mobility gives workers an opportunity to improve their financial situation. If they are permitted to train for new jobs, move location or seek higher wages, then they are more likely to be happy working, which can have a positive impact on productivity. Workers who do not feel indefinitely relegated to low wages or jobs with few benefits will consistently seek better positions, which also makes it easier for new industries to attract the most qualified applicants by offering better perks. As in the micro level theories of migration, potential labour migrants weigh up the benefits and disadvantages when migrating for a job. In these circumstances, the motivations predominantly depend on personal situation, i.e. financial status, personal desire, preference etc. These are generally linked to the strength of the economy in which they live.

In order to raise awareness among EU citizens and to boost mobility levels, the EU Commission has implemented various programmes or so called ‘action plans’, as outlined in the section above, these, consequently, should have led to higher mobility levels. However, the outcomes were such that there were no increased levels at all (Zimmermann, 2012). As Baumer (2009) notes, although labour mobility is considered as a key component of European integration and is a valued and tangible right for EU citizens, the challenge for the EU is that this general enhanced welfare is difficult for individual EU citizens to perceive (Baumer, 2009). Portes (2015) supported the view that economic values need to be proved and presented convincingly to EU citizens in order to dispel the misinformation and myths surrounding them. That is, the advantages of mobility to the individual have not been clearly explained by the EU’s institutions, with the discourse, instead, being focused on the aggregated economic benefits.

A further major reason why labour mobility and mobility levels are regarded as highly important within the framework of the integration process grounded in the Economic and Monetary Union (EMU). Labour mobility received attention in the early debate on the EMU. It was stressed that the reduced room for absorbing asymmetric shocks (economic shocks that affect some countries only) via macroeconomic policy tools in a monetary union required a sufficient degree of labour mobility as an alternative adjustment channel. Against this background, labour mobility would help in easing adjustment: it would permit a more moderate reaction of activity rates and part of the divergence in unemployment rates would be absorbed by mobility rather than real wages.

Within monetary unions<sup>36</sup>, labour mobility is attributed a special function. The EMU, introduced in 1990s, represented a further tool of (economic) integration. In a successful monetary union, where according to Mundell’s (1961) standard theory of optimal currency areas (OCA), three market mechanisms operate to mitigate external

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<sup>36</sup> The EU Monetary Union that came into force in 1999. In March 1999, after years of controversy and often difficult economic adjustment, 12 of the 15 EU member countries took one of the most far-reaching steps in the history of integration theory: the adoption of the euro with a fixed exchange rate - a state of total irreversible convertibility of currencies together with an irrevocable fixity of exchange rates with zero margins of fluctuations (Eijffinger & Haan, 2000).

shock: labour mobility<sup>37</sup>, the mobility of capital, and lastly, wage price flexibility. The costs of giving up the exchange rate as an adjustment mechanism (as a consequence of entering into an economic union) would be reduced if other adjustment mechanisms, in particular labour mobility, were able to operate (Mundell, 1961). Under this lens, the following is proposed: normally, under flexible exchange rates regimes, economic imbalances or ‘disturbances’ (Eichengreen, 1997) are reduced through the appreciation and depreciation of currency. However, as the EMU is a currency area without regional monetary and exchange rate policies, this mechanism is no longer available and other market adjustment mechanisms are needed instead. Considering that prices and wages are inflexible, the OCA theory states that labour mobility has to facilitate adjustments. Accordingly, migration plays an important role in increasing the efficiency of the labour market. In sum, through this optic, during asymmetric shocks, labour mobility would function as an adjustment mechanism, which makes it important for an EU that has adopted the EMU. Having discussed the theory, next, to what extent its functionality is justified in practical terms is scrutinised.

In practice, as aforementioned, labour mobility has never increased, or at least considered to have sufficiently increased in order to function as an adjustment mechanism for correcting the imbalance created through asymmetric shocks (see European Commission 2014a for an expanded debate). Several researchers have studied the efficiency of labour mobility in an OCA and have concluded that the EMU is far from being one, as mobility levels have failed to increase. In Puhani’s study (1999), the first important one that focused on the euro area countries, the elasticity of migration was estimated with respect to unemployment rate and income changes on panel data sets for three countries: Germany, France and Italy. He found that labour mobility only had a small chance of becoming a sufficient adjustment mechanism in the event of asymmetric shocks. Another important feature of the role of labour mobility as an adjustment mechanism was offered by a study carried out by the National Bank of Netherlands (Cavelaars and Hessel, 2007). This addressed the question as to whether regional migration is an adjustment mechanism or a source of

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<sup>37</sup> To achieve optimality in a currency area, labour mobility has been advanced as a fundamental criterion (Buiter, 1998; De Grauwe, 1993, 2003). Interestingly, as early as 1957, James Meade had argued in relation to adjustment mechanism of labour mobility that low labour mobility in Europe meant that exchange rates should remain flexible within that area (Meade, 1957)

disturbance. The results were even more controversial: the importance of migration as an adjustment mechanism was questioned; with the conclusion being drawn that migration in Europe is more an imbalance mechanism than an adjustment one. Another interesting conclusion is that the establishment of the internal European market and the euro's introduction did not have a significant positive impact on labour mobility as an adjustment mechanism in the European Union. That is, the contribution of labour mobility between regions to economic adjustment in Europe has been almost negligible. Beetsma and Debrun (2004) added that whilst "Mundell argues labour mobility is an important criterion in judging whether a group of countries constitute an OCA" (p. 105) Obstfeld and Peri (1998) went further, arguing that a high degree of geographical mobility in the labour market is not cost-less, and can even be undesirable. The cost and benefit balance can be negative both for the regions of net emigration and for those of net immigration as well as for the workers involved. Bini Smaghi (1993) stressed that even if migration proved to be effective in absorbing shocks, this would not mean that it is an efficient adjustment mechanism, since it can be the source of interregional imbalances and welfare losses. Further doubts were put forward by Buiter et al. (1998), who questioned migration's "usefulness as a substitute for a nominal exchange rate flexibility" (Buiter, 1998, p. 192). Mongelli (2002) underlined that "while labour mobility could ease the adjustment to permanent shocks, EMU will not be able to significantly benefit from this attribute in the immediate future. In any case, labour mobility is no panacea either: it would be in any case low in the very short run, but possibly higher in the medium- and long-term, and it entails reallocation and/or migration plus retraining costs that could be quite significant" (Mongelli, 2002, p. 16). Further doubts on the usefulness of labour mobility as a substitute for a nominal exchange rate flexibility were put forward in studies by Buiter et al. (1998), L'Angevin (2007), Ricci (2008) and Beine et al. (2000). Di Genova (2004) and Ricci (2008) critically analysed the conditions for an optimal currency area and concluded that the EMU is far from being an OCA. In short, according to the critics in the literature, labour mobility has failed to function as a structural adjustment mechanism in the EU owing to the low levels of mobility, thus failing to deliver an OCA.

By contrast, Pelkmans (1998) contended that it is wrong to claim that labour mobility will not serve as a remedy due to it being notoriously low in Europe. He explained

that what counts for the effectiveness of exchange rates in a diversified economy, primarily, is “not labour mobility within countries but between sectors” (unlike Mundell’s simple example) as in case of price rigidities, sectors not hit by a specific shock will benefit (Pelkmans, 1998, p. 292). Bradley (2005) and Patterson (1998) shared the similar view, emphasising that especially job-related mobility will be more important for the working of the EMU in future than “geographic mobility” (Bradley, 2005, p. 332). Basically, some economic scientists indicate that there needs to be made a difference between labour mobility between sectors and labour mobility between regions, before evaluating the phenomenon as an adjustment mechanism in the EU. Notably, Patterson (1998) opined that less labour mobility in the Euro area does not mean an additional problem for EMU, because there was small interregional mobility in small-sized ‘monetary unions’ before its inception (Patterson, 1998, p. 20). In a recent report released by the EU, the Commission states that “Euro area membership does not seem to increase mobility per se, but it is estimated to make mobility more sensitive to unemployment differentials” (EU Commission, 2014). Another recent report by the EU suggests that “although the magnitude of mobility flows in the EU remains below what could be expected in a fully integrated monetary union, the responsiveness of labour mobility to asymmetric demand shocks has increased over time” (EU Commission, 2015).

The low levels of mobility are not the only issue. There also exist inconsistencies regarding the causal relation between common currency and labour mobility. Whereas Meade (1974) argued that the foundation for a common currency does not exist, due to lack of labour mobility, and that a flexible exchange rate system would be more effective in promoting internal stability, Scitovsky (1976) took the opposite stance, favouring a common currency, as according to his belief, it would induce a greater degree of mobile labour when further steps were added. Both cases imply, in the first place, that an essential ingredient of a common currency area is a high degree of factor mobility. However, whereas Meade opined that the necessary factor mobility does not exist, Scitovsky argued that labour mobility must be improved and that the creation of a common currency would itself stimulate mobility. Consequently, among theorists, the causal relation is unclear, that is, whether a currency union will lead to higher mobility levels or whether high mobility levels are

required in first place in a common currency union. Thus, according to the literature, the role of labour mobility as a functional adjustment mechanism is fiercely debated.

Moreover, Tavlas (1994) claimed that “countries with similar characteristics that respond in similar ways to external shocks will require less exchange rate adjustment between them”, which puts even more doubt on the usefulness of labour mobility in an OCA and thus, in a converged region. The Commission noted mobility levels responded more when compared to the earlier shocks in the last crisis (EU Commission, 2015). However, they also noted that wages had a starker effect as an adjustment mechanism: “The contribution of labour mobility to the overall fluctuations of unemployment remains low. When the analysis is extended to the response of wages, it turns out that real wages have become more responsive to labour market conditions” (EU Commission, p. 12, 2015).

Portugal, as will be shown in the case study chapter, constitutes an EMU member states with high outward migration due to asymmetric shocks and divergence. Although most of its population primarily migrates to the UK, which is a zone outside of the EMU, still, it is interesting to find out how much labour migrants are affected by the impact of divergence.

## **2.5 Different views on intra-EU mobility: Institutions and member states**

There is no consensus among the member states about mobility levels. Whilst the supranational institutions state that labour mobility leads to social cohesion (EU Commission 2002), the UK government has contended that too much inward migration leads to the opposite, i.e. to social divergence, thus creating tensions to the cohesion of society. For a few of the new member states, the right to free movement of labour did not come on the date of accession, but the barriers to trade and capital flows were lifted at this juncture (Guardia & Pichelmann, 2006). Historically, the stronger economies at the centre of the EU advocated controlled circulation of labour migrants, as has been shown in the previous sections. Today, some of the member states, especially those who have been receivers, still share the view that migration levels should be controlled.

A report released recently published by the EU, positively promoted how “Mobility across the EU has been increasing over the past two decades, in particular following

the 2004 EU-enlargement” (EU Commission, 2015). Whereas the EU Commission evaluates the higher mobility levels resulting from the enlargement as a ‘positive’ sign, the UK, for instance, was not amused about the very high numbers of Polish labour migrants going there. Most of these migrants came to work in low skilled sectors, which was the key reason why they were considered undesirable.

From the above discussion, it can be observed that even if free movement as a fundamental right is granted and despite the ambitious aims to meet the demands of a competitive Union at the leadership level, without the willingness and motivation of the individuals, the act of ‘moving’ will not take place. Consequently, the actors, in this case potential labour migrants, needs and preferences as well as their behaviours as *homos economicus* have to be considered as well. Migration in this case can be regarded as a personal choice and independent from economic implications other than for the individual migrant. The question then that arises is what can governments and EU institutions do to mobilize people to migrate, other than reducing barriers. As Bonin (2008) remarked, the social advantage of mobility or even its disadvantages in relation to the promotion of a EU identity, for instance, have been rarely discussed.

## **2.6 Deepening integration 2: Integration through social cohesion and convergence**

The introductory chapter has portrayed how the European states, after WW2, were confronted with the arduous task of reconstructing their national economies; embarking on an entirely, but more than ever challenging course. As a collective of member states, which exhibit underlying differences concerning their historical and political background, the EU member states presented a composition of a mixture of differing strengths of the regional economies. The Central and Northern members generally were more powerful regarding their economic strenghts, whilst those to the South and East had less secure economies. The EU leaders were convinced that ‘integration’ of the periphery with the core economies would be the best way to achieve a powerful, economically unified Union on a long-term basis, one of the core objectives of the founding members. In order to surmount the challenge of unifying economically different regions, the EU officials soon adopted the economic ideology of ‘integration/integrating the regions’. This approach is suggested by



growth models which promote the integration of economies for long-term for economic growth.

The following subsections consider the concepts of cohesion and convergence as part of the integration agenda in the EU. Cohesion, in the context of European integration incorporates the belief that European economies can converge, that is, move toward similar levels of development and social well-being, by the principle of mutual solidarity. Moreover, it is grounded in the belief that collective action through a partnership between the EU and national/regional/local governments can play an important part in improving economic and social conditions.

#### 2.6.1 Convergence through cohesion in integrating economies

The conceptual framework of convergence in integrating economies / and integration is most comprehensively discussed in Leonardi's opus from 1995, in 'Convergence, Cohesion and Integration in the EU'. In his book, Leonardi (1995) proposed a convergence model of European integration, whereby "integration can be seen as a multitier phenomenon affecting not only different levels of government (national, regional, and local) but also various sectors of society, such as economic, political and social systems" (Leonardi, p. 183, 1995). According to Leonardi (1995), whilst integration leads to the creation of supranational institutions, when it is combined with convergence it has a profound effect on the structure, decision-making processes and implementation procedures adopted by national and subnational governments for regulating economic and social behaviour. Regarding his conceptual framework, he explained that both convergence and integration take place, being achieved in three spheres/dimensions, namely, economically, politically and socially, through the act of cohesion.<sup>38</sup> In integrated economies, convergence provides one of the important precondition for integration.

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<sup>38</sup> Economically, the reduction of barriers to the circulation of information, goods, services, capital and persons within a single, unified market. This will lead to an equalisation of factor prices in the various sectors. On a political sphere, transnational parties are created to take charge of candidate selection, political campaigns and coordination of legislative behaviour in European-wide elections, and intergovernmentalism is the standard form of decision-making in public administration and policy making. In social terms, the national societies operate as one cultural market, share common social values, and operate their social institutions in a coordinated and parallel fashion. (Leonardi, p. 189)

The premise of the European Community was that its people shared fundamental interests, and therefore progress should be measured in terms of lifting the entire community in a fair and equitable manner. “Imbalances”, the EC report on cohesion writes, “do not just imply a poorer quality of life for the most disadvantaged regions ...(but also) an underutilisation of human potential and a failure to take advantage of economic opportunities which could benefit the Union as a whole” (EU Commission, 2002). The operational definition of ‘economic cohesion’ was convergence of basic incomes, rates of employment and competitiveness. “Social cohesion” could be measured in terms of universal systems of social protection and mutual support. This would mean a reduction in the incidence of poverty as well as improvements in productivity and the quality of life. As Taylor contended, the pursuit of cohesion represents a clear and strong commitment to the principle of solidarity or a “community of interests”, on the part of the more developed states in favour of the poorer and peripheral areas (Taylor, 1983, p. 167).

#### 2.6.2 Treaty-based origins and evolution of regional policy

The application of convergence through cohesion is carried out under the regional policy in the EU and is also referred to in broader terms as cohesion policy as its overall goal is to strengthen what is known as ‘economic, social and territorial cohesion’ in regions qualifying for support. The European Union tackled the problem of reducing disparities within the Community at the very early stages. The Treaty of Rome had very explicit goals in regard to “laying the foundation of an ever closer union among the peoples of Europe”: such as ensuring ‘the economic and social progress of their countries by common action to eliminate the barriers that divide Europe’, ‘to strengthen the unity of their economies and to ensure their harmonious development’.<sup>39</sup>

Two instruments that would define Europe’s initial approach to the problem of reducing disparities within the Community were referred to in the Treaty of Rome. Firstly, the European Social Fund (ESF), set up in 1958, was designed to invest in economic and social restructuring across the EU with the aim of reducing gaps in

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<sup>39</sup> Preambles to the Treaties Establishing the European Communities, in *The European Union: Readings on the Theory and Practice of European Integration*, ed. Brent F. Nelsen and Alexander C-G. Stubb, CO: Lynne Rienner Publishers, 1998.

development between European regions. The ESF would provide money for vocational training and for facilitating movement by workers into other areas or jobs (spur labour migration and training). It would invest in people, with a focus on improving employment and education opportunities. It was also aimed at helping disadvantaged people at risk of poverty or social exclusion. Adjacent to the ESF, the ERDF was created with the same objective in 1975, to reduce disparity.<sup>40</sup> ERDF has the purpose of strengthening regional economic and social cohesion by investing in growth-enhancing sectors so as to improve competitiveness and create jobs. The ERDF also finances cross-border cooperation projects and was the first institution that focused on the problem of regional disparities.

### 2.6.3 Neoliberal policies and the re-strengthening of cohesion policies

In 1986, the legal basis for regional policy was established in the Single European Act (SEA) of 1986<sup>41</sup>, which aimed to eliminate roughly 300 intra-Union barriers by 1992, thus moving towards more integration, convergence and social cohesion. It included a new perspective involving a more precise set of goals under the title “Economic and Social Cohesion” (Article 130A-E). With the introduction of the (SEA), the goal of reducing disparities in relation to the three dimensions, namely, economically, politically and socially, was rejuvenated and gained even more importance. European countries took major steps toward economic integration, including the liberalisation of the capital and labour markets, harmonisation of tax policy, and the foundation of the European Economic and Monetary Union (EMU). One of the major reasons for focusing on the reduction of the regional disparities was due to the entrance of new peripheral states into the EU. In 2004, the Union experienced the largest enlargement process in its history, by absorbing eight Central and Eastern European countries (CEEC) countries. Soon thereafter, Bulgaria and Romania joined the EU on 1 January 2007, raising the number of former Communist Bloc countries among EU members to ten. Following successful transformation of their political and legal systems and the transition from planned to market economies

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<sup>40</sup> Article 130c discusses the role of the European Regional Development Fund in helping to ‘redress the principal regional imbalances in the Community through participating in the development and structural adjustment of regions whose development is lagging behind’

<sup>41</sup> The effort to reduce disparities had grown so great that the EU officials proudly compared it in scope and magnitude with the Marshall Plan, but being seen on a permanent rather than an emergency basis, as was the case with the latter initiative (source).

during the early 1990s, these countries were faced with the task of catching up with the economies of Western Europe (see e.g. Sachs, 1996). Economic convergence constitutes an essential ingredient for common structural and monetary policies, and there are good reasons to expect increased per capita real income convergence along the road to EU accession (Borsi & Metiu, 2013). This enlargement coincided with the leader of then President of the European Commission, Jacques Delors, addressing the necessary task of creating convergence and social cohesion, arguing that additional funds should address the challenge of regional disparities. To make the Structural Funds spending more effective, the SEA initially introduced three objectives, which were later modified to 11 thematic objectives supporting growth for the periods 2014-2020. Currently, 81.5% (€283.3bn) of the EU budget is devoted to fulfilling this objective.

Moreover, the 1992 Maastricht Treaty set an agenda for nominal and real convergence prior to entering the EMU, and the European Commission put forward numerous policy initiatives aimed at the reduction of regional economic disparities and improving competitiveness among EU members (Borsi & Metiu, 2013). The Delors II budget proposal, agreed in December 1992 at the Edinburgh Summit, carried with it a strong commitment to increase spending in the less developed member states by doubling the Structural Funds (Regional Fund, Social Fund and Agricultural Guidance Fund) and creating a new Cohesion Fund to operate over the next six years. The Maastricht Treaty created two more cohesion instruments: the Cohesion Fund for the four poorest countries – Greece, Ireland, Portugal, and Spain – and the European Investment Fund for poor regions. The Cohesion Fund would also be used to help poor countries stabilise and converge their economies so that they might be able to qualify for economic and monetary union. The resources for funds now equalled a third of the budget. This clearly demonstrates the serious intent to reach convergence among all EU member states.<sup>42</sup> Today, it is laid out in the Treaty of Lisbon that “The Community shall aim at reducing disparities between the levels of development of the various regions and the backwardness of the least favoured regions...” (Treaty of Lisbon, 2009).

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<sup>42</sup> The aim of the Cohesion Fund was to invest in green growth and sustainable development as well as improving connectivity in member states with a GDP below 90% of the EU-27 average.

#### 2.6.4 What is convergence?

Leonardi (1995), the pioneer of the convergence theory, defined convergence “as the end-product of socioeconomic policies designed to reduce socioeconomic disparities that exist among the regions and nations within Europe” (p. 34). The author continued, “the initially weaker economies benefit from appropriate economic policies designed to spur development, and if economies of the peripheral states and regions grow at rates faster than those in the core areas”, this leads to convergence between regional and national economies, via the application of cohesion policy, as outlined the previous subsection. Furthermore, he added that “as a corollary, the prospect of convergence is enhanced if former core countries undergo economic decline as part of industrial restructuring or even deliberalisation.”

From a traditional or classical approach, one can say that the convergence hypothesis is based on the Solow-Swan exogenous growth model, a neoclassical growth model, which has dominated the literature since the 1950s. The model predicts that the gap between rich and poor countries will narrow, a process also simply known as catch-up growth. In the European context, this is supported through the Structural Funds and the Cohesion Fund. Furthermore, it is distinguished according to two concepts or versions: beta and sigma convergence. Beta convergence refers to a process in which poor regions grow faster than rich ones and therefore catch up with them. The concept is directly related to neo-classical growth theory (Solow, 1956), wherein one key assumption is that factors of production, in particular capital, are subject to diminishing returns. (This also implies that the growth rate of poor economies should be higher and their income and/or GDP per head levels should catch up with those of rich economies.) While beta convergence focuses on detecting possible catching-up processes, sigma convergence simply refers to a reduction of disparities among regions over time.

#### 2.6.5 Measuring convergence

Leonardi (1995) distinguished between four types of convergence (p. 205): physical, economic, political along with social and cultural. Physical convergence pertains to the reduction/bridging of physical distances, e.g. via the introduction of the European YGV network or the Eurotunnel. It also refers to integrating ‘electronic’ distance,

whereby electronic communication systems are used to eliminate the gap between the core and periphery as well as between metropolitan and non-metropolitan areas within nation states. Economic convergence refers to eliminating production and monetary differences. Production differences pertain to the aspects of productivity, GDP, manufacturing, trade, investment and so on. Monetary differences comprise interest rates, exchange rates, size of public deficit, and savings rate. The first type can be addressed by stimulating the process of convergence through total elimination of tariff and non-tariff barriers to trade. Whilst monetary differences are currently being addressed by the creation of the EMU based on a common currency, institutions for regulating the fiscal and monetary policies as well as common budgetary discipline have also been put in place. Political convergence refers to closer cooperation on such matters as defence, joint planning and supranational legislation. Social and cultural convergence pertains to social policy, social standards, educational policy etc., which are being addressed by such as the introduction of the ERASMUS programme.

The majority of the studies that have measured convergence in the EU are based on measuring GDP levels. The operational definition of economic cohesion was convergence of basic incomes, rates of employment and competitiveness (Leonardi, 1995). Social cohesion pertains to universal systems of social protection and mutual support. Monfort (1999) explained how “in spite of the fact that Cohesion Policy aims at more than purely economic convergence, the reduction of regional disparities in the level of development has mainly been measured as the convergence of regional levels of GDP per head relative to the EU average. This type of convergence has even become a major aspect in assessing the effectiveness of the European Cohesion Policy.” Hence, real convergence means reduction of differences in the standard of living, and is commonly approximated according to GDP per capita or labour productivity.

#### 2.6.6 Convergence in the EU

This section provides a brief overview of the progress of convergence in the EU. One of the possible effects of integration, economic convergence among participating countries, has been a recurrent theme in studies of European economic integration. Regarding which, whether economic integration among countries or

regions within a country leads to economic convergence has been widely debated in the growth and development literature over the last two decades. Real income convergence among a group of countries (regions) is understood as being the approximation of the levels of some measures of economic welfare, such as real per capita income, among those countries (regions), in the long run (Barro and Sala-i-Martin, 1995).

A comprehensive and incisive study of the effect of regional and cohesion policies was carried out by Leonardi (1995), who elicited positive results among member states regarding these. Using regression analyses, he tested various explanatory variables, including distance from the core countries, foreign investment, level of industrialisation, unemployment, and EC funding. He found that the best predictor of convergence is distance from the core countries, and the best explanatory variable is EC spending.

There is a general agreement in the existence of a decrease in regional inequalities (i.e. convergence) from the fifties to the seventies and a relative stagnation afterwards (Molle and Broeckhout 1995; Suarez-Villa and Cuadrado-Roura 1993). Armstrong (1995) observed  $\beta$  and  $s$  convergence in the period from 1950 to 1990, but at a higher rate in a first subperiod up to 1970. Neven and Gouyette (1994) showed the insignificance of the  $s$  convergence process since 1980, in spite of a slight decrease in disparities since 1984. This latter work also demonstrated that homogeneity is higher among the Northern regions of the EU than among the Southern ones. The decrease and even stagnation in the regional convergence process from the late 1970s has also been observed in other economies. Sala-i-Martin (1996) identified this pattern for the USA, Japan and some of the European national economies. Andrés and Doménech (1995) observed a similar trend for the OECD economies, while Mas et al. (1995) concluded there was temporal instability of the convergence process and the exhaustion of such a process from the early 1980s among the Spanish provinces.

## 2.7 Conclusion

The convergence of European regions, which is the basic principle of EU regional policy, and one of the main objectives of the EU integration process, has become

deeply entrenched under what is known as the EU Cohesion Policy. In the treaties, cohesion is defined and is to be achieved mainly through the promotion of growth-enhancing conditions and the reduction of disparities between the levels of development of EU regions and member states. They are being promoted through economic and political integration. For, it is perceived that if the dynamics of the single market and monetary union improve integration levels then the prospects for the weaker regions in the Community will improve. It is understandable that the more peripheral regions and countries are more supportive of the European Community, the integration process, and the pursuit of active regional development policies at the European level. This is because they are considered to be the net gainers from market integration due to spread effects. The idea of convergence gained further importance and strength with the rejuvenation of the SEA and the reduction of the barriers to move. The liberalisation of the markets should lead to an ever more converged EU. The significance of convergence is undoubted, as the Structural Funds and the Cohesion Fund comprise one of the largest items of the budget of the European Union. Conclusively, since the introduction of the SEM, the EU commission has visualised both, a successfully converged European Union, hand in hand with high mobility levels. Whether these two concepts constitute a perfect duo, is investigated in depth in the forthcoming chapters. Also, whether the focal case study countries, particularly Poland and Portugal, have converged or diverged since membership and how the migration levels relate to the convergence levels are also covered.



## Chapter 3 Methodology

### 3.1 Research approach

This research relies mainly on the tenets of social science, whose simple but profound statement of task is that research ‘needs to analyze the collective behavior of human beings and how this is linked to social instruments and institutions. . . . no social action can be understood without an understanding of the broader context in which it takes place’ (Castles, 2012, p. 123). Migration in this research is regarded as a response not only to institutional changes within the EU framework, but also to the changing social lives of migrants, as their social lives determine the needs and the perceived needs of the individuals. This understanding of migration highlights the importance of embedding micro-level studies in an understanding of the macro-level structural factors ‘that shape human mobility in a specific historical situation’ (Castles, 2012, p. 123).

One of the preliminary criteria for conducting academic research is that the research methods need to be suited to fit the specific purposes of framing as well as answering the research questions (Hammersley & Atkinson, 1995). The present chapter gives a description of the methodology and states the rationale behind the selection of the methods and their application. This research has chosen to test several hypotheses via qualitative methods. For many years, quantitative methods were dominant, but now critical thinkers (such as Mills) agree that although ‘such approaches may advance the description of social phenomenon’, they ‘do very little to increase understanding of the processes which bring them about or indeed to find solutions to the pressing dilemmas of society’ (Castles, 2012, p. 123). The act of moving from one place to another, i.e. migrating, should not be regarded as an impersonalised act isolated from feelings or from motivations. In an effort to avoid this trap, this research regards qualitative methods as the most suitable ones, as they include the individual and personalized feelings and perceptions towards external changes as well as needs.

In research methods it is generally assumed that quantitative studies are positivist by nature, whereas qualitative studies are interpretivist and thus are used as two separate approaches in research. Nevertheless, sometimes, hypotheses are still tested via the

use of qualitative methods, as is the case in this research. It would not have been wrong to follow the positivist approach and employ quantitative methods in order to explain the relationship between migration and the changes in standards of living, namely the convergence or divergence between the two variables, as this relationship is the essential basis of this research. However, the nature of the positivist approach presents some limitations, as positivists believe that ‘there is a single objective truth or “reality” that can be found’ (Castles, 2012, p. 10). Considering the fact that migration is, ultimately, a social act, this research believes that the positivists’ belief is not entirely true, and that relying on figures may not present the best answers to the question ‘What are the determinants behind the different sizes of migration streams?’. The results from the narratives in the interviews will reveal how more than one determinant can provide motivation, and how there is a relationship between the different types of variables, in this case, social and economic variables. In addition, the results help to explain how social facts, which are the ‘ways of thinking, acting and feeling’ (Durkheim & Catlin, 1985, p. 3), may in fact be more important than previously thought. These characteristics are hard to ‘measure’. Rather, the researcher aimed ‘to try to understand the “meaning” of social action and institutions for the people involved, leading to the idea of “interpretative sociology”’ (Castles, 2012, p. 123). Thus qualitative methods were employed for the analysis of the data.

The apparent gulf between the positivism approach and interpretivism is said to reflect ‘the dual character of society’, leading to the central question, ‘How is it possible that subjective meanings become objective facticities?’ (Berger & Luckmann, 1966, p. 17). After considering the advantages as well as limitations of both theories, this thesis selected qualitative data (instead of quantitative data) to ‘test’ the hypotheses, thus providing a somewhat mixed use of both theories and consolidating the tenets into one framework. Generally, in hypothesis testing, the norm is to use quantitative methods. However, this research has employed a less traditional merger of the two methodologies in order to address the research question. Whereas quantitative research is generally said to be confirmatory, and therefore deductive in nature, qualitative research tends to be exploratory and inductive in nature (Yin, 2010). The inductive approach starts with many observations, but it is used to confirm very specific deductive hypotheses in this

research. The mixture of both has been used as well because migrants are social agents who react to changes; in other words, migrants display convergence levels and reactions to their social surroundings. Pure deductive method, in which logic is the authority, has therefore been dismissed as less appropriate for these targets of study.

Semi-structured interviews, performed with participants representing each of the three case studies, and validation of the data via triangulation with secondary data were the methods selected as particularly appropriate to address the main research question and the hypotheses and sub-research questions for each of the three presented case studies.

### **3.2 Local context**

London is one of the most vibrant and attractive cities in the European Union, with its post-industrial character and concentration of financial, legal, and business services; indeed, its characteristics have led to a high number of people living in the city and earning higher wages (Sassen, 1991). Being such a dynamic city, London boasts a labour market with a significant pull factor. Moreover, London can generate demands for labour so high that sometimes the demands cannot be met by natives, e.g. those in the low-skilled sector (May et al., 2005; Spence, 2005). London has currently the largest proportion of migrants in the EU, and recent estimates show that approximately 40% of all the migrants in the UK live in London; this makes up about a quarter of London's population (26%) (MRN, 2011, p. 1). London is attractive to migrants for a variety of reasons (e.g. study, work, family, asylum), but certainly work is one of the most significant. The city's expanded economy offers a variety of opportunities to enter the labour market for people with different skills, and is defined by Fielding (2007) as an 'escalator region' due to its nature as a socio-occupational escalator. This particular characteristic or reputation certainly attracts lots of labour migrants. According to the figures of the Labour Force Survey (LFS) for 2009–2010, four out of every ten employed persons in London are migrants.

A significant share of low-paid occupations in London is filled by migrants (Spence, 2005). This established pattern is well visible among the participants in the first case

study group, i.e. the Polish labour migrants, who mostly had high educational qualifications but were employed in the tertiary sector.

### **3.3 Research design**

In order to explore the motivations of labour migrant groups with different sizes of migration streams, the research selected three sample groups based on regional differentials. Whereas their similarity was based on the fact that they were all labour migrants, i.e. they had moved to the UK in order to work, their main characteristics differentiated them from each other. Their main characteristics included their arrival from different regions with different levels of convergence within the EU: Eastern Europe, Central Europe, and Southern/Mediterranean Europe. These regions are differentiated by the degrees of convergence and economic attainment migrants from them have achieved over the decades. Degrees of convergence and economic attainment in turn depend on the length of the membership in the EU (see later chapters on convergence for detailed analysis). In addition, each of the three countries is representative of one region: Poland (joined the EU in 2004) is representative of Eastern Europe; Germany, one of the founding members of the EU (joined in 1958), is representative of the Central European region; and Portugal (joined the EU in 1986) is representative of Southern/Mediterranean Europe. Each country is analysed in a case study. The following section portrays the suitability of each country in detail.

### **3.4 Case selection criteria**

The selection of the countries, i.e. Poland, Germany, and Portugal, was based on a number of criteria, which classified them as suitable in respect to the research question.

#### **3.4.1 Poland**

##### *3.4.1.1 Legal and historical background*

Poland, as part of the EU, provides a highly suitable foundation for the analysis of the two concepts – convergence and migration in the EU – under discussion for two reasons: its geographic and economic size and its rich migration history. Poland

constitutes the largest economy in Central Europe, and the sixth largest in the EU. Poland joined the EU in May 2004 as part of the largest enlargement in the history of the EU.<sup>43</sup> Expectations of large numbers of labour migrants from the new accessing countries were not necessarily a secret. The only really surprising element was that they arrived in far greater numbers than expected, overwhelming all speculations and statistical forecasts. The gigantic migration corridor from EU8 countries to the UK, from Poland in particular, turned into ‘one of the most important social and economic phenomena, shaping the UK today’ (Pollard, Latorre, & Sriskandarajh, 2008, p. 7). It still heavily influences the immigration debates today.

The foreseeable mass migrations invoked a transition arrangement requiring visas or visa-like access. Some EU member countries even introduced a complete delay to access their labour markets to control the expected surge of labour migrants coming from the CEE countries. The arrangements were tailored according to the individual economic profiles. The majority of the EU-15 member states imposed a 2–4 year transition policy to protect their labour markets until the A8 member states had time to adjust their economies. Austria and Germany enforced stricter regulations towards potential mass migrations from the new EU member states and enforced the maximum transition time of 7 years. Others, on the contrary, allowed immediate access to the labour markets, as was the case for the UK, Ireland, and Sweden. In regard to intra-EU migration, some researchers argued that the distance between the sending and the receiving countries would influence social networks and potentially cause devaluation of qualifications, and hence may act as a deterrent to migration between places who are geographically farer from each other (e.g. Dobson, Latham & Salt, 2009; Fevre, 1998). This argument proved to be untrue. The UK was the largest recipient of Polish labour migrants. Obviously, particularly regarding the UK (which is one of the few islands on the European continent), the geographic distance as a potential hindrance to migration seemed to play no role at all during the east-west migration. Possible explanations for the deviant predictions may be attributed to the past intra-EU migration history. In 2002, it was found that only 1.5% of EU

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<sup>43</sup> After a substantial negotiating period which started in 1989, then Polish Prime Minister Tadeusz Mazowiecki expressed for the first time Poland’s interest in joining the EU in his speech in the European Parliament. Shortly after, Poland joined the EU together with 9 other states, known as the ‘A10’ countries, namely Slovakia, Slovenia, Malta, Cyprus, Latvia, Lithuania, Hungary, Czech Republic, and Estonia. The EU henceforth opened a new chapter regarding the history of EU migration, and Poland has since held a special position in debates on intra-EU migration.

workers lived in different member states which, according to Recchi, Baldoni, Francavilla, and Mencarini (2006), was a statistic that had not changed in 30 years. When creating the transition arrangements, the UK government expected to receive inflows of between 5,000 and 13,000 A8 migrants (Dustmann, Casanova, Fertig, Preston, & Schmidt, 2003). In reality, estimates ranged from approximately 250,000 migrants (Booth, Howarth, & Scarpetta, 2012) to one million migrants arriving to the UK from the A8 countries between 2004 and 2010 (UKBA, 2014). The UK, as a popular destination among EU migrants, thus provides a perfect base for the examination of Polish workers, and London in particular is known to be the home of a very large Polish community. Whether the UK would still have opened its borders immediately if the country had known that so many would arrive remains an unanswered question.

#### *3.4.1.2 Economic background*

Currently, the Polish economy constitutes the largest economy in Central Europe and the sixth largest in the EU (World Bank, 2015). Before the EU fell into recession in the late 2000s, the Polish economy was experiencing a yearly growth rate of over 6.0% (Ram, 2007). Even after the global recession of 2009, Poland's GDP continued to grow. At the high point of the crisis, in 2009, the GDP of the EU as a whole dropped by 4.5% while the Polish GDP increased by 1.6% (Faris, 2013). According to the Central Statistical Office of Poland, in 2010 the Polish economic growth rate was 3.9% despite the crisis, which was one of the best results in Europe. In November 2013, while the size of the EU's economy was still below the pre-crisis level, Poland's economy had increased by a cumulative 16% (Faris, 2013).

The economic fluctuations did have an impact on Poland's unemployment rate though, which reached around 11% in 2013 (Faris, 2013), which though still below the European average, was high. Just prior to its membership in 2004, in 2002 the unemployment rate in Poland peaked at 20%. It was only in 2008 that Poland's rate dropped below the EU average (Faris, 2013).

Although Poland has not been a member for very long, Poland has experienced a steep growth above the average of the EU. The convergence of Poland will be discussed in more detail in the evidence chapters (see chapter four), but it is visible

how the growth rates of the EU are above the average, hence Poland is experiencing ‘convergence’.

#### *3.4.1.3 Migration of Poles to the UK: How many Poles came to the UK after 2004?*

The most notable sources, which captured the number of Polish who entered the UK include the Labour Force Survey (LFS), the International Passenger Survey (IPS), the Worker Registration Scheme (WRS), and the National Insurance Numbers (NINos) issued. Stock data generally measures only the first arrival (e.g. the WRS and NINos) or the number at any one time (e.g. the LFS or census). There is more data existent in the numbers and characteristics of migrants in the destination country (the UK) than the origin (Poland). The numbers are not definite. Linking different sources may help to make better estimates, but 100% accuracy is excluded.

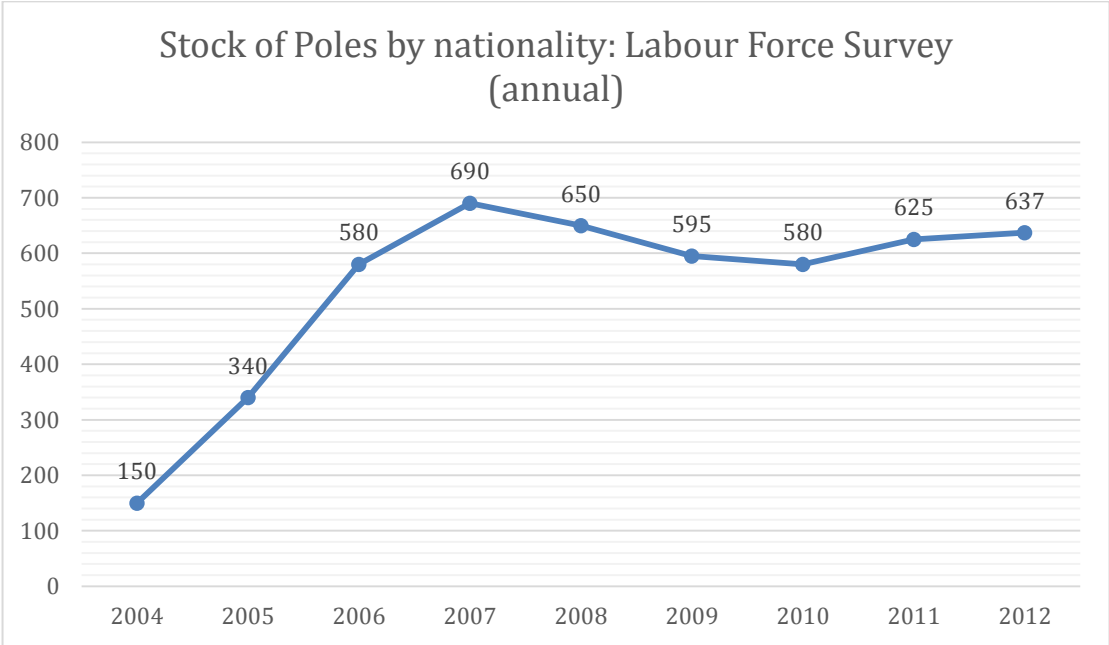
When surveying migration data, analysts distinguish between official emigration and temporary migration. ‘Official emigration’ constitutes the status of an individual who has cancelled his/her Polish domicile prior to the departure to be counted as an emigrant. Very few Polish comply with official emigration procedures. Thus, the numbers of ‘official’ emigrants are far from the real numbers. The latter, temporary migrants, are persons aged 15 or over whose duration of stay in a foreign country at the time of the survey was at least 3 months but did not exceed 1 year. Net migration presents the difference between immigration (i.e. people moving to the UK for more than one year) and emigration (i.e. people leaving the UK for more than 1 year). For instance, overall net migration increased from less than 100,000 in the mid-1990s to a preliminary estimate of 216,000 in 2011.<sup>44</sup> In 2006, the Home Office stated that the Poles comprise almost 70% of all A8 migrants residing in the UK (Home Office, 2006).

**The Labour Force Survey (LFS).** The UK LFS provides data on the stock of the Polish population by nationality and is available after 2004 on an annual basis. The figures in Figure 3-1 below refer to nationality, not country of birth, and the data refer to England and Wales only. According to the LFS, which provides the number of people at one time prior to the EU accession, 24,000 Poles were in the UK. The 2002 census provides similar figures, where 23,700 were temporary migrants in the

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<sup>44</sup> [www.migrationobservatory.com](http://www.migrationobservatory.com) , accessed 28. 07. 2015

UK (3.0% of the total). After Poland’s accession to the EU in 2004, there was a steep annual increase of migrants coming to the UK from Poland; the numbers doubled after the first year from 150,000 to 340,000. The number of Polish people living in the UK thus reached 690,000 in 2007. As visible by the table, 2007 was the peak. Afterwards, a smooth decline is visible regarding the numbers of Poles living in the UK. The decline stopped in 2010 at 580,000, and recovered after 2011. In 2012 it was at 637,000. Overall, the net increase in the stock of Britain-based temporary Polish migrants between May 1st, 2004 and December 31st, 2012 was between 573,000 and 588,000. In general, after EU accession, in subsequent years, the UK came to occupy a much more dominant role as a destination, so by December 2012 an estimated 637,000 had stayed in the UK for more than 3 months.



**Graph 3-1 Estimated stock of temporary migrants from Poland in 2002–2012 by major country of destination (UK)**

Source: Adapted from the data in LFS (2015)

**The Workers Registration Scheme (WRS).** The two most used statistical sources for measuring the inflow of Poles are the WRS and the issued NINOs. The WRS was set up on behalf of the UK government with the aim of gathering statistics on the inflow of A8 migrants. It was also set up in order to understand the type of work the migrants were doing or the location within the UK of the major inflows (UKBA, 2014). The registration was not obligatory, as the UK constructed an open transition

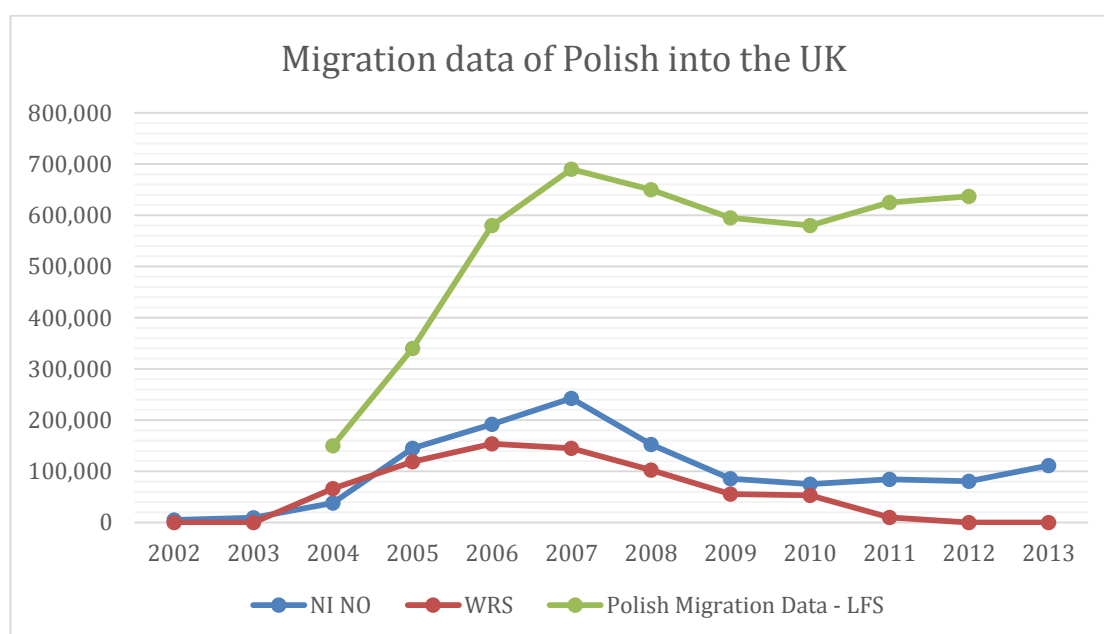


arrangement. Nevertheless, migrants were expected to register. Incentives were introduced to encourage the incoming migrants to sign up, e.g. those who registered could claim benefits if working. It is noteworthy to mention that claiming benefits, such as job seekers allowance, could occur only after the migrant had worked in the UK for 12 consecutive months, with no more than a 30-day break (Gillingham, 2010). The limitations of the WRS are manifold, and it misses several important points. For instance, there were high registration fees for migrants, so many migrants who were self-employed or students were not counted through the WRS. Additionally, the statistics did not take into account return migration. Furthermore, the statistics were cumulative, rendering the accurate counting of migrants who re-enter and reapply problematic and preventing the regional count from reflecting the actual number of migrants in the area due to intra-UK migration. Particularly, the inflated numbers as a result of the cumulative count of A8 migrants may pose a question to the validity of the statistics provided by the WRS. The registration scheme ended in April 2011.

By the end of 2005, the WRS had registered 185,490 Poles. Over the next 3 years, a further 401,268 registered. By the time of its demise in April 2011, the WRS had registered 1.134 million A8 citizens, of whom 705,890 (62.2%) were Poles. As explained, WRS registrations undercounted the actual numbers coming to work, as those who were self-employed were not required to register. Others simply chose not to register, with surveys variously suggesting that the proportion choosing not to register was as high as 36% (CRONEM, n.d.) and 42% (Pollard et al., 2008). The likelihood of registering varied by geographical location and sector. More likely to register were people living in smaller towns, older workers, and those intending to stay for longer periods (CRONEM, n.d.). Construction sector workers were less likely to register since the majority of them were self-employed (Drinkwater et al., 2006).

**The National Insurance Numbers (NINos).** NINos record all newly entering foreign workers who go on to pay national insurance contributions. NINos do include the self-employed. Any migrants coming into the UK who already have a NINo from an earlier period of work are excluded from the data. NINos also allow migrants to access the benefits system.

The number of NINos issued was already beginning to rise before accession, but afterwards the number escalated rapidly, reaching almost a quarter of a million in 2007 (see Figure 3-2). By 2011, one million NINos had been issued to Poles. By 2013, the figure had risen to 1.164 million. As the recession took hold, the number fell, but from 2009 it was relatively stable each year at around 80,000 until 2013, when it rose to 111,000. Although after adjustments there is a broad consensus about the number of Poles coming to work, Harris et al. (2010) showed that discrepancies between WRS and NINo statistics vary geographically, being particularly great in London (55% difference) where self-employment is more likely. The differences between the aggregated ‘flow’ data from the WRS and NINos and the ‘stock’ data from the census and LFS give some indication of the scale of temporary migrations and the reasons behind them. NINos recorded a shift in the ages of those registered. The proportion of those aged 25-34 declined after 2002 while that of the younger 18–24 population increased. This concurs with the Polish data and is consistent with a pattern of young people, probably single and willing to accept shared accommodation, moving temporarily as they come to find work after their secondary or tertiary education is complete or to pursue further or higher education in the UK.



**Graph 3-2 Comparison of NINo, WRS, and LFS Polish migration data**

Source: Generated based on data from LFS 2014

The different statistical sources on the migration data about Poles exhibit

fluctuations and variances. Figure 3-2 visualizes the flow of migrants from three different statistical datasets, namely the NINos, WRS, and LFS. According to each dataset, Polish labour migration surges until 2007 and then experiences a drop afterwards. The decline of inward migration of Poles into the UK coincides with the Euro crisis. In the following chapters the migration rates will be compared with the indicators of economic convergence in the EU, UK, and Poland, and it will be discussed how the migration levels related to these support the quantitative data via the use of the qualitative data which was gathered as part of this research.

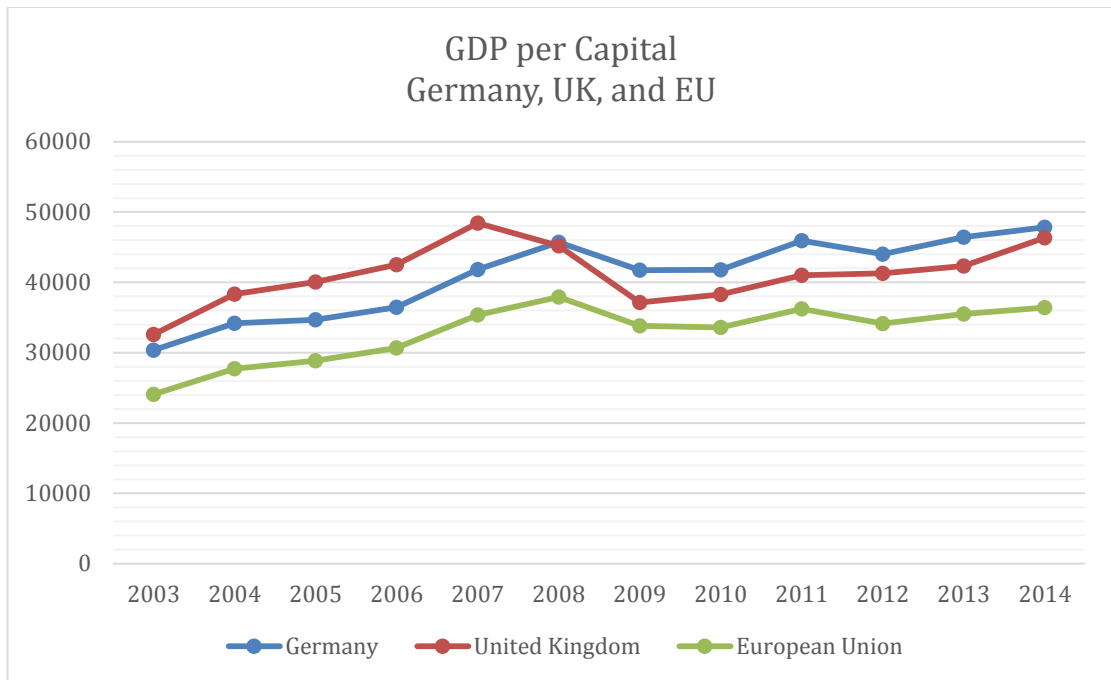
### 3.4.2 Germany

#### *3.4.2.1 Legal and historical background*

Germany is one of the six founding members of the EU and hence is one of the oldest member countries. Today, it presents the largest national economy in Europe, the fourth largest by nominal GDP in the world and the fifth largest by GDP (PPP) (Chandler, 1990). It is has the largest population in the EU. Germany has always been an advocator of EU integration and acted as a key figure and catalyst in the forming the Single European Act (SEA) in the 1970s. The country is also a founding member of the Eurozone.

#### *3.4.2.2 Economic background*

Germany is in the top ranks and among the strongest countries in terms of economic power in the EU, with GDP per capita levels relatively close to those of the UK. There are no significant differences in terms of GDP per capita levels when comparing the level of convergence between the UK and Germany. The two countries share similar levels of GDP per capita and both have GDP per capita levels above the EU average. Figure 3-3 presents the GDP per capita of Germany, the UK and the EU from 2003 to 2014.



**Graph 3-3 GDP per capita of Germany, the UK, the EU**

Source: Generated based on data from World Bank

Figure 3-3 indicates how Germany's and the UK's GDP per capita levels are relatively close to each other, meaning that they have converged successfully. In 2003, the GDP per capita levels were almost equal, with around 30,360 US Dollars in Germany and around 32,580 US Dollars in the UK. To compare, Poland's GDP per capita was at only around 6,640 US Dollars in 2004. Additionally, over a period of 10 years, the GDP per capita has increased quite smoothly in both of the high-income countries. In 2014, both GDP per capita levels were highly similar and almost equal at around 46,000 US Dollars. Figure 3-3 also shows how both countries were affected by the Euro crisis after 2007. The UK experienced a steeper drop in terms of GDP per capita than did Germany. All in all, Figure 3-3 effectively represents how standards of living, as defined by GDP per capita, are close to each other in Germany and the UK, meaning that the two countries have converged, and how in both countries the standards of living are above the EU averages.

#### *3.4.2.3 Germany and migration*

Although Germany has become to be known as an 'Auswanderungsland', or an emigration country (i.e. more people are emigrating into Germany than immigrating

from it), their emigration rates compared to Poland's are still far behind. In 2004, approximately 697,632 Germans migrated in total worldwide. This number is equal to the number of Poles who just came to the UK as labour migrants once restrictions to move freely into the UK for Polish citizens were lifted. For the years from 2009 to 2013, the migration rate was -142,000, meaning that 142,000 more Germans emigrated than immigrated (SVR, 2015).<sup>45</sup> This circumstance, however, is regarded as regular among high-income countries (Ette & Sauer, 2010, p. 64). Throughout the last 10 years, Germany's migration levels have been quite constant worldwide, between around 600,000 and 700,000 yearly until 2012. Only in 2014 did the levels reach a peak for the first time with over 900,000. The UK was in the top five destinations of Germans as an emigration country and the number one country destination within the EU. The UK Census 2001 recorded around 266,136 people living in the UK who had been born in Germany. This made up the fourth-largest foreign-group after the Irish, Indians, and Pakistanis (UK Census, 2001). The UK Census of 2011, held 10 years later, recorded 262,356 Germany-born residents in England. In addition, 11,208 Germans were resident in Wales, 22,274 in Scotland, and 3,908 in Northern Ireland. As a result, over the 10 years, the figures have hardly changed.

### 3.4.3 Portugal

#### *3.4.3.1 Legal and historical background*

Portugal became a member of the EU in 1986, together with Spain. Through their membership and the largely increased trade ties, as well as inflow of funds allocated by the European Union, both of the countries were able to enjoy a stable economic growth and development.

Portugal experienced a recession in 1993, but after the recession the economy grew at an average annual rate of 3.3%, well above EU averages. Portugal qualified to join the EMU, but had to agree to cut its fiscal deficit and undertake structural reforms. The EMU brought to Portugal exchange rate stability, falling inflation, and falling interest rates. It continued to enjoy economic growth in 1999, with falling interest

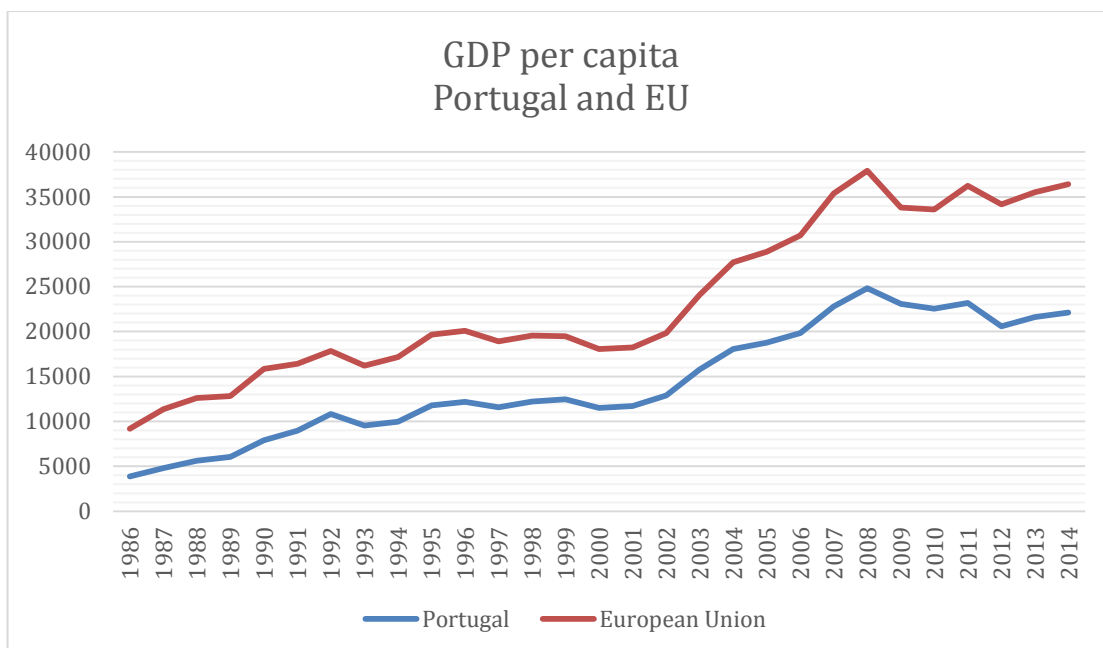
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<sup>45</sup> Data on German emigration is more available and of better quality than data on German immigration (SVR, 2015).

rates as well as low unemployment. In the years of 2001–2002, the overall rate of growth slowed down. Portugal was severely affected by the financial crisis in the latter part of the first decade of 2000, causing a wide range of domestic problems.

#### *3.4.3.2 Economic background*

Portugal succeeded relatively well in raising its standard of living to that of the other EU member states. In terms of GDP per capita on a purchasing power parity, the basis rose from 51% of the EU average in 1985 to 78% in 2002 (World Bank, 2012). Figure 3-4 displays the progress of the GDP per capita in Portugal and in the EU over the years 1985 - 2014. When Portugal joined the EU, the GDP per capita levels were slightly less than that of the EU (about 9200 per capita in US Dollar) with at around 3 900 GDP per capita. In comparison to Poland, Portugal was doing better at the time of entry into the EU, as outlined above Poland had only about a fifth of the GDP per capita levels when it joined the EU. In the following years, a slight but constant rise at similar levels can be observed until the beginning of the 2000s. The figure shows how the GDP levels have always been below the EU average. Economic convergence in terms of GDP per capita is not necessarily visible, although Portugal has experienced convergence to some extent and is generally said to have caught up with its EU member states (see Chapter 2). Until the beginning of the 2000, no striking change can be observed regarding the convergence of Portugal with the EU average.



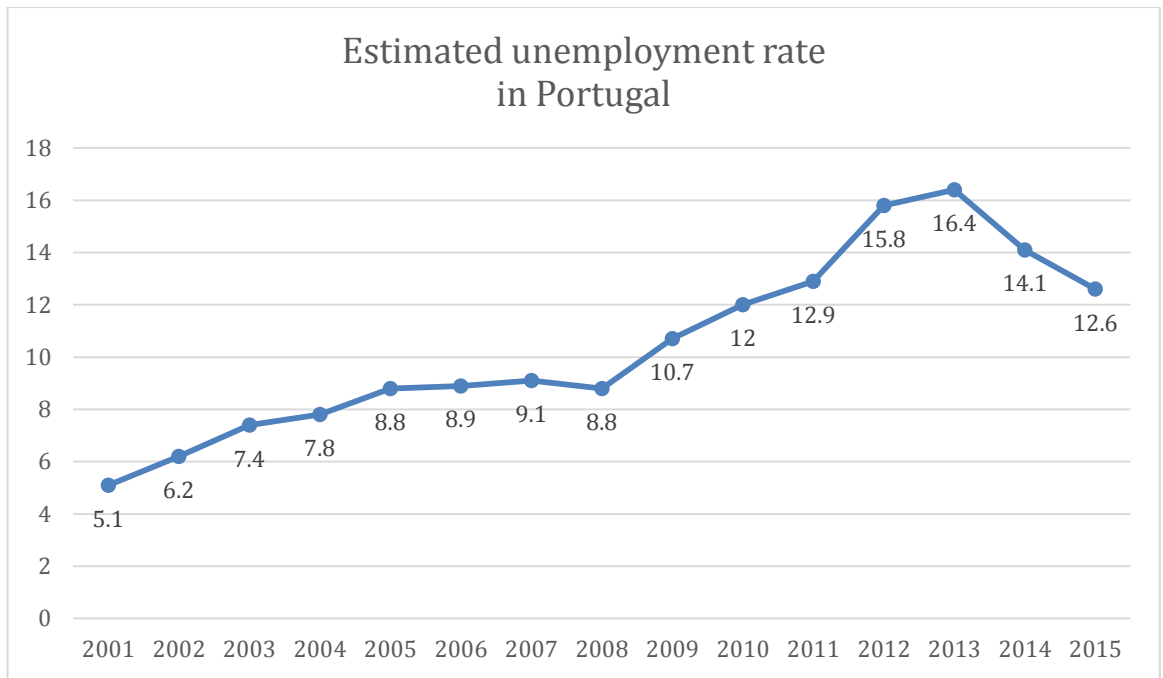
**Graph 3-4 GDP per capita in Portugal and the EU**

Source: Generated based on data from World Bank

A striking change in the growth rates can be observed after 2003. The GDP per capita levels from 2003 onwards started to diverge. By 2005, the GDP per capita on a purchasing power parity dropped to 72% (World Bank, 2016). By 2006, GDP growth was at 1.3%, the lowest rate in all of Europe. Countries such as Malta or Slovenia overtook Portugal in terms of GDP per capita. A large gap started to emerge until it peaked in 2008 when the financial crisis started. In the same year, Portugal hit a GDP per capita of just 24,816 USD, compared to the 37,915 GDP per capita of the EU average. Divergence has not improved.

In terms of unemployment, in 2001 the unemployment levels stood at 4.1% and were low compared to the EU average. In the following years, from 2002 to 2007, the unemployment rate increased by 65%, namely from 270,500 in 2002 to 448,600 Portuguese citizens in 2007.<sup>46</sup> Graph 3-5 below shows the unemployment levels for the years 2001–2015 based on Eurostat data.

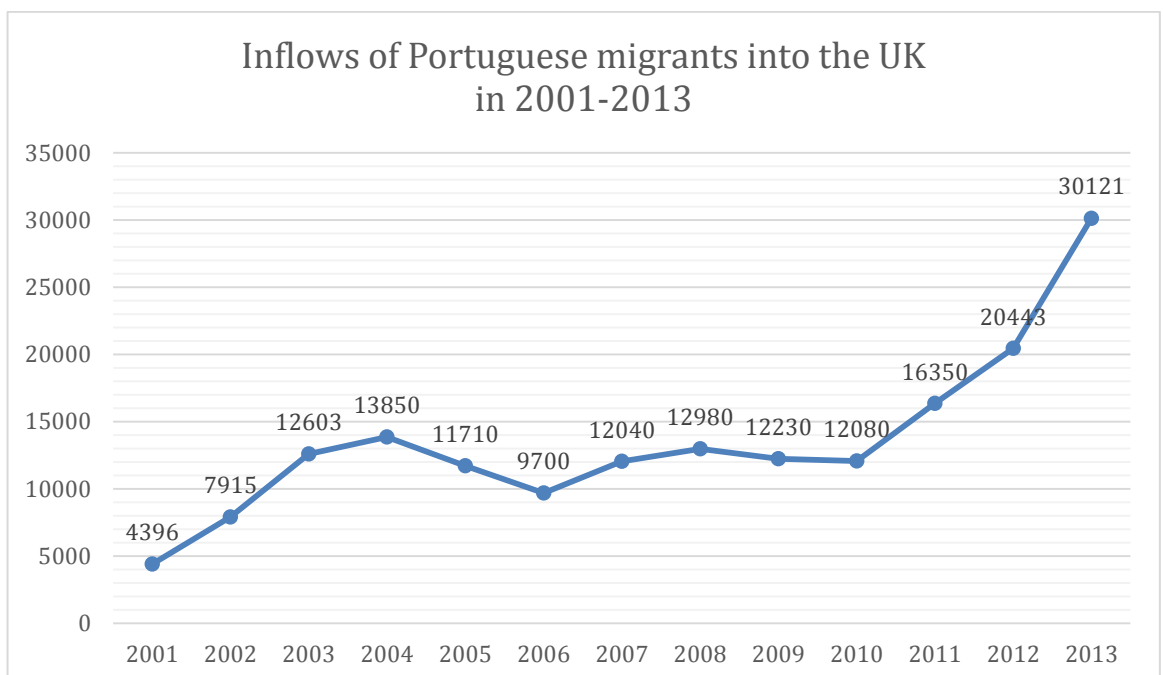
<sup>46</sup> IMF.org. (accessed October, 2015)



**Graph 3 – 5 Estimated unemployment rate in Portugal 2001- 2015**

Source: Generated based on data drawn from Eurostat, 2015

The rise of unemployment is clearly visible. In last decade from 2001 until 2013, unemployment growth rates continuously rose. The peak was reached in 2013 at 16.4%, but the rates especially grew after 2008. Graph 3 -6 depicts the inflows of Portuguese migrants into the UK for 2001–2013.





### Graph 3 - 6 Inflows of Portuguese migrants into the UK in 2001 – 2013

Source: Data retrieved from Factbook Portugal, 2014

Inward migration into the UK increased after 2001. As mentioned above, 2001 marked the year when unemployment levels began to grow in Portugal. The migration of the Portuguese continued to rise steadily, then stopped flowing into the UK in 2004. According to Eurostat (2016), at that point the flow of Portuguese labour migration shifted to other countries instead.<sup>47</sup> Subsequently, inward migration into the UK regained strength, rising exponentially after 2001. The immense rise corresponds with the high rise in unemployment levels illustrated above. The previous section showed how Portugal diverged in terms of GDP per capita especially after 2011. The observations of the three indicators, GDP per capita, migration levels as well as unemployment rates lead to the understanding that migration levels increased in parallel with divergence. This relationship is validated in Chapter 6 through primary data.

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<sup>47</sup> [www.ec.europa.eu/eurostat](http://www.ec.europa.eu/eurostat) (accessed October, 2015)

#### 3.4.4 Final explanation of case study selection

In the first place, in the identification of countries for the case studies, the records of their economic development played a crucial role. At the point of their EU accession, both Portugal and Poland were far behind the EU average concerning their economic development (expressed by GDP per capita). Portugal, which entered the EU in 1986, caught up in the economic adaptation process and thus experienced convergence 'to some extent', though within its own limits. Entering the EU only in 2004, Poland is still exposed to the development and the adaptation process according to EU standards. Nonetheless, in just the first decade of membership, Poland's economy has performed quite well, with growth rates well above the average; this is promising, as economic convergence between the member states in the EU is one of the fundamental aims of the EU integration process. Germany is one of the founding members of the EU and wealthier on average. The three countries from different converged regions provide a sound basis for a comparison regarding the differences in the attitudes of their citizen towards migration: namely in converged, partially converged, and non-converged/exposed-to-convergence regions in the EU.

The three case study countries are in particular suitable for a comparison because their economic background allows for exploration of their tendency and intentions towards migration and for comparison among migrants from regions which have experienced economic advancement (e.g. Portugal) versus migrants from regions which have recently joined the EU and still are exposed to advancement (e.g. Poland). As Portugal has converged and the standard of living has improved in the last few decades, providing better well-being for citizens, Portugal presented a sound basis to find out about the motivations of the migrants, especially because their country has been affected by financial downturn in the last few years. The case study on the Portuguese migrants was analysed under the impact of the financial crisis, which opened a new migration corridor with thousands of migrants moving from the southern EU member states towards the northern EU states, including Portugal. By scrutinizing the determinants of migration, the aim was to find out how the Portuguese citizens responded to the crisis. The function of the German case study is to identify the motivational patterns of those migration streams, which are relatively

‘lower’ in the EU. Two of the regions, namely Southern/Mediterranean Europe and Eastern Europe, have a high record of labour migration (past and present). Germany, in contrast, has always been a migrant-receiving country. Historically, Portugal used to be a migrant-sending country, providing the western member countries with significant numbers of labour migrants. Poland’s current economic figures in terms of GDP levels are similarly low Portugal’s GDP per capita levels when it entered the EU. Scrutiny of Portugal may provide a projection of Poland, which is undergoing a similar cohesion process as Portugal did. Within the EU, so far, cross-border labour migration has occurred in large numbers from less developed to developed regions. Comparison of the determinants of motivations among groups of people with lower tendencies to migrate is also important. By scrutinizing the motivations of different groups and types of migrants, this study aims to provide a better foundation for understanding why people in the EU move – or do not move.

### **3.5 Illustration of the empirical framework**

The ultimate aim of the thesis is to answer the research question, which asks whether the aims of the EU, i.e. to achieve convergence and to generate high mobility levels, are compatible. In order to answer the question, the research study has tried to show how economic convergence, i.e. the minimization of economic disparities in terms of, for example, wages or income levels, leads to less stimulation to move. This implicates a relationship between the variables ‘economic convergence’ and ‘intentions to move’, whereas the latter forms the dependent variable. This relationship was examined via applying the theories of migration on the migrants. The determinants from the theories of migration were extracted and their ‘applicability’ was tested on the migrants. In addition, the research and its empirical work also tried to determine the interaction of economic indicators with the motivations and to establish a relationship between the two independent and dependent variables. By doing so, in order to answer the main research question, a hypothesis or sub-research question for each case study was set. For the first case study, which examines migration after the enlargement process of 2004, the main hypothesis is that the determinants of large migration masses are based on economic indicators. This case study sought to identify the motivations behind as well as the impact of macroeconomic structures on the motivations of the labour migrants. The

second case study hypothesized that the main stimulants are non-economic related and primarily defined based on social variables. It was necessary to establish and prove this argument in order to show how social migration is the reason behind low levels of mobility. The third case study asked what the motivations to migrate behind medium-term converged countries are. At the same time, the third case study was performed in order to show how divergence, as opposed to convergence, leads to higher migration levels, motivating people to migrate. The hypotheses were tested through a multiple stage approach as illustrated in Table 3-1 below. The data extracted from the interviews was evaluated by focusing on the inclusion of the economic and social determinants, as well as their interrelation. The relevance of each variable is weighted according to the density in the responses based on their interpretation of the situation. In order to meet the tenets of the hypotheses, it had to be proved that the Polish population, which constitutes a ‘highly mobile group of migrants’, migrates in the first place for economic reasons only: hence economic variables for the Polish sample size are regarded as ‘highly important’.<sup>48</sup> Parallel to this condition, economic determinants had to be tested negatively on the German sample size. This means that as long as the German workers in the UK confirmed that they did not come for economic motivations in the first place, but for other reasons, then the hypothesis of this thesis is supported by empirical evidence. The necessary conditions are marked in red in Table 3-1. Furthermore, as a second, but unnecessary condition, it had to be proved that social determinants such as prestige or acquisition of skills were not important for the Polish sample size, or at least not as important as the economic motivations. On the contrary, social (non-economic) determinants should be one of the main reasons why the Germans came to London, or more in general, why EU citizens move between economically similar (or converged) regions. According to the statistics, the percentage of German workers in the UK is very low compared to that of Polish labour migrants; this observation further indicates that mobility is only attractive when there are economic motivations.

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<sup>48</sup> See Table 3-1: Highly important = High Imp

**Graph 4-7 The optimal / expected conditions for confirmation of theory (i.e. hypotheses)**

	Variables	Poland	Germany	Portugal
<b>Economic Determinants</b>	Income / Wage differential	High Imp	No Imp	-
	Employment / Unemployment	Imp	No Imp	Imp
	Labour Market Characteristics	Imp	No Imp	-
<b>Social Determinants</b>	Prestige	No Imp	Imp	-
	Power	No Imp	Imp	-
	Social Status	No Imp	Imp	-
	Networking	No Imp	Imp	-

Low mobility levels =  $0 * \text{economic} + y * \text{social}$

High mobility levels =  $x * \text{economic} + 0 * \text{social}$

Imp = Important

Source: own compilation

Essentially, the aim of the empirical chapters (Chapter 4, Chapter 5, Chapter 6) is to compare the migration streams from converged and non-converged regions on the basis of their motivational background. The interviews sought to expose the different motivational attitudes between the comparison groups and to link the relevant observations to the levels of the groups' economic development. Finally, the comparative approach was employed to expose how mobility of workers is largely related to the convergence levels. This thesis thereby aimed not only to provide an explanation as to why there exists no mobility between converged regions, but also to determine how mobility rates relate or even reach to the standard of living and how motivations to migrate interact with changes in standard of livings (convergence or divergence). The novelty of this research study lies in the synthesis of the convergence theory and migration theory in explaining labour migration via qualitative methods. The major outstanding characteristic, which makes this research especially interesting, is the fact that information was gained directly from labour migrants through face-to-face interviews. Whereas the majority of existing studies rely on estimations of quantitative analysis providing predictions and estimates, this

study gained direct responses from the people concerned. Another unique feature of this study is the differentiation and direct comparison between regions according to the degree of convergence. Additionally, the results of most of the migration studies are based on international studies, whereas this study will be EU-specific and concentrate only on the EU.

As the main research question tries to find out whether one of the EU's major aims, to achieve increased mobility levels as well as convergence, are compatible, the relationship between the two variables (i.e. convergence and high mobility levels) was analysed. As this thesis does not rely on quantitative analysis, the two variables of convergence and migration and their correlation were not measured via statistical methods, but examined via the motivations behind migration as variables and its linkage to convergence levels. Commonly, it is accepted and believed that through the use of sophisticated data analysis software and through feeding quantitative data (numbers) into a regression analysis package, one will obtain scientifically valid results (Castles, 2012, p. 14). However, issues such as mistaken or inadequate survey techniques may lead to poor quality of data, and the results henceforth may be misleading. Certainly, similar issues may apply to use of qualitative data too, e.g. biased sampling techniques can lead to questionable results. The next sections will discuss how these kinds of issues were addressed. The variables, consisting of determinants behind motivations, were dependent on the convergence levels, namely the economic convergence level, expressed in GDP per capita, and the migration levels. The variables have been 'tested' on the migrants. The major criterion was the migrants' economic background and the history of labour migration.

The interviews served as a tool by which to understand the individual circumstances and concepts that result in people migrating. The interviews allowed the collection of contextual information during investigation of emerging findings that came out of the qualitative analysis, and even permitted the researcher to go beyond and seek after extraneous variables. The interviews thus provided a more interpretive resource for understanding results. In quantitative research, although data may show that most people migrate for economic reasons, such data may not clarify the contexts within which migration decisions are made or the potentially unique meanings people attach to events such as finding a job (Morgan, 1998, p. 362). As Lyytinen (1987) noted,

because quantitative studies are ‘restricted to readily measuring static constructs, they neglect aspects of the cultural environment and social interaction and negotiation that could affect not only the outcomes, but also the constructs under study’ (cited in Kaplan & Duchon, 1988, p. 573). The qualitative research thus will help in situating the quantitative research in the context of people’s migration-related decision-making process and experiences. Interviewing as a methodology is considered for this research particularly appropriate as it seeks to trace the process of change and unveil actors’ motivations (George & Bennett, 2005; Hall, 2006). A similar methodology has been used in Leila Simona Talani’s book from Egypt to Europe: Globalisation and Migration Across the Mediterranean (2009). Her exceptionally successful studies served as an inspiration for the methodology of this research. The triangulation of the results with secondary data has served to trace and corroborate the findings from the qualitative data with quantitative data. As qualitative methods can help to understand the intentions and social meanings, but cannot give an accurate measurement of the frequency of certain attitude or behaviours (Castles, 2012, p. 15), linking the results with descriptive data and validating the relationship through triangulation with existing findings provided a good combination of methods to answer the research question.

### **3.6 Strengths and limitations**

The data used to test hypotheses was collected through 61 semi-structured open-ended interviews with ‘labour migrants’, people who came to the UK to work. The interviews were guided interviews; therefore, although the interviews did have specific questions, the respondents had a lot of leeway in how they chose to reply to the questions. The questions did not always follow the outline of the interview guide or the exact list of questions. The flexibility during the course of the interviews was highly important in gathering the data, as the interviewees’ tendency towards specific issues based on their own judgment revealed the value and importance of the variables. For instance, the first response to the first question ‘Why did you come to the UK’ was highly important, as according to the tenets of this research study, the variable mentioned in the primary response would be categorized as the most important one among other possible variables which would come up during the course of the interview.

Fundamentally, this research did not directly ask about the importance of the determinants, but instead let the respondents determine the most important answer based on their own instinctive or intuitive thoughts. Other variables were only addressed directly if they were not mentioned at all in order to find out whether they were not important at all or if they were maybe simply forgotten or neglected for another reason. In their answers, the respondents could provide multiple answers, however they were provided in a sequence according to the importance of the variables. This flexibility was required in order to explore the underlying dynamics of preference formation regarding the determinants. Therefore, it was sometimes necessary or important to dig deeper into a certain topic or aspect, which may have come up unexpectedly or seemed important.

Once the interviews were finished, the researcher was left to trust the participants and had to take their explanation of the events discussed at face-value. In order to verify the responses, the same or similar question were sometimes asked twice during the course of the interview, in order to increase the truthfulness of the responses, which is sometimes considered as a limitation in the employing qualitative methods. Validity is typically an issue in qualitative research, as the researcher is bound to rely on data, which may not always provide true information.

However, this disadvantage were addressed by reiterating the question about the most important determinant behind the motivation to move during the course of the interview, and re-extracting the answers, which ensured the validity of the 'intuitive' answer in the beginning. The same strategy was used for all of the three case studies. In a field research study on the motivations of Polish migrants which was conducted in 2008 and was followed up in 2011, Porter (2012) found that, although the interview questions were not changed, the data in 2011 provided non-economic motivations which were not present in 2008 data. Although this is only a very vague indicator, one possible suggestion of this finding is that the migrants' perception of their motivations changes with time. As mentioned, as time passes, the migrants become more socially aware and the change of their perceptions may influence their reflections on their motivation. As in Porter's (2012) findings, the interviewees did mention social variables, but presumably, during the decision-making process, the value of the social variables may have been of lesser importance.



The primary data on the determinants of the motivations was triangulated with secondary data. The primary data was supplemented by scholarly literature of relevant fields. Moreover, the data's relationship was analysed with the independent variable (economic convergence) via the use of descriptive data economic indicators (GDP levels, or data on migration levels). The qualitative data is thus basically supported by quantitative secondary data.

### **3.7 Design and procedure of the interviews**

This section outlines the structural and procedural decisions related to the interviews and provides information about such as where the interviews were held, the length, and any other factors related to the interview procedure.

#### **3.7.1 Structure of the interviews**

The interviews for all groups were held in 2014 and were mostly conducted in cafés close to the participants' workplace and frequently during participants' lunch break or after they had finished work. For the German and Portuguese groups, incentives were sometimes given, e.g. an invitation for a coffee or cake after the interviews. The interviews were audio recorded via a hand recording device with the consent of the participants and were subsequently transcribed. During the interviews, notes were taken as well, in addition to the recordings. Only one participant did not want to be recorded; in that case, more detailed notes were taken throughout the whole interview. After the interviews, follow-up notes were made. In total, 69 interviews were held: 25 for the Polish case study, and 22 each for the German and the Portuguese case studies. While the Polish and Portuguese case study interviews were conducted in English, the German interviews were done in German, as German is the native language of the researcher. No translator was required, as the researcher also performed the translations from German into English afterwards.

#### **3.7.2 Procedure of the interviews**

As qualitative interviewing deals with the temporary relationship between the interviewer and the interviewee, problems related to trust, control, and expectations can arise (Bryman, 2008). Before commencing with the interviews, it was necessary to gain the trust of the participants. This was successfully achieved in part by

addressing the potential participant by his or her name whenever possible at the first acquaintance. Before the consent was given, it was also made clear why this research was being done, what institution the research was associated with, and the fact that it would be strictly anonymous. Furthermore, it was explained what would be done and how the data collected would be handled.

When posing questions, the researcher was very careful and objective particularly when asking the participants about their motivations for migrating and during the course of the decision-making process. The researcher stayed conscientious of her body, ensuring that any body language and tone of voice remained as neutral as possible. Such neutrality in an interviewer helps to prevent participants from attempting to give answers that they assume the interviewer wants to hear. In addition, limited details were shared about the precise content of the research thesis so as to avoid pre-made up responses toward to ensure the quality of the interviews. The interviews were stopped when the answers became repetitive.

### 3.7.3 Design of the interview questions

When selecting questions and compiling the interview guide a number of points were kept in mind. Bryman (2008) suggests asking oneself ‘what do I need to know in order to answer each of the research questions I’m interested in?’ as a guide to devising the list of interview questions (p. 442). Accordingly, the interview guide did not contain contextual introductory questions in order to prevent opinion building in the answers. Rather, the research aimed to identify the most appealing answer by relying on the intuition of the respondent. As the interview progressed, more specific questions digging deeper into the dynamics of the decision-making process of migrating were addressed. If an important thread emerged, follow-up and probing questions were asked to elicit more information about the relevant processes.

## 3.8 Selection and accessing of the interviewees

The random sample of interviewees more or less confirmed the data in existing literature about migrants’ characteristics: the participants were relatively young and well educated, where the majority hold a university degree. The majority came spontaneously, intending to stay only for a temporary amount of time, but then

happened to stay longer. This section outlines the interviewee selection methods, the participant makeup, and the challenges encountered in accessing the participants.

### 3.8.1 Selection of interviewees

The sample was based on random selection. This research study selected its participants using the methods of ‘purposive sampling’ and ‘snowball sampling’. In purposive sampling, the researcher strategically selects interviewees who are relevant to the research question (Bryman, 2008, p. 458). Purposive sample sizes are often determined on the basis of theoretical saturation. Snowballing is considered a type of purposive sampling. In snowballing, the social networks of the existing contacts were used to refer the researcher to other potential contributors to the research study (Yin, 2010). Bryman (2008) defines snowball sampling as follows: ‘With this approach of sampling, the researcher makes initial contact with a small group of people who are relevant to the research topic and then uses these to establish contacts with others’ (p. 184). In addition, Bryman adds theoretical sampling as a sub-group of purposive sampling, the main idea of which is that interviewees continue to be selected until a category has been saturated with data (Bryman, 2008, p. 426, 458).

#### *3.8.1.1 Parameters for selection of Polish participants*

The participants for the first case study group on Polish labour migrants working in the UK were in particular chosen upon pre-informed data. In total, 22 Polish migrants who came to London were interviewed. The literature has identified post-2004 Polish migrants as possessing a unique set of characteristics. As a group, these Poles are characterised as being young, single, a combination of males and females, economically motivated and well educated (Anderson, Ruhs, Rogaly & Spencer, 2006; Home Office, 2006; Pollard, Latorre & Srisakandarajah, 2008). For instance, Okolski (2014) found that the occupational ranges of Polish labour migrants stayed ‘mainly at the lower end of the skill spectrum’ (p. 17). By 2011, the new arrivals had spread themselves widely across the main economic sectors. The largest group of these Polish migrants (27%) was in distribution, hotels and restaurants, followed by manufacturing (19.2%), business services (16.5%), and public administration, education and health (11.6%). The transport and communication industry hosted

almost 10%, but only small numbers were in agriculture (1.3%) and public utilities (1.4%). The bulk of the new arrivals were economically active in employment (379,287 migrants, or 81.4%), a small but significant number were inactive (12.1%), and only a few were unemployed (3.5%). Of the inactive migrants, 3% were full-time students. Of those employed (56,931 migrants, or 17.7%) were self-employed. (Okolski, 2014, p. 16)

Existing literature has found that the young, highly skilled Polish migrants are commonly employed in the third sector in the UK (Anderson, Ruhs, Rogaly & Spencer, 2006; Pollard, Latorre, & Sriskandarajah, 2008). Accordingly, the sample size was based on a random selection of Poles working in the catering service, in restaurants and cafes, and as shop assistants. The sample comprised 22 people, of whom 8 worked in catering, 10 worked in cafés/restaurants, and 4 worked as shop assistants. Before commencing the interviews, the researcher ensured that the participants had been living in the UK for at least 12 months and otherwise satisfied the definition of a ‘migrant’.

#### *3.8.1.2 Parameters for selection of German participants*

The selection of the German participants included skilled as well as unskilled workers. The sample size comprised 21 participants. According to the literature (e.g. SVR, 2015), most of the German migrants are categorized as ‘highly skilled’. It was, however, in the interest of this research to explore the determinants of both types of groups. In total, 12 skilled and 9 unskilled labour migrants were interviewed. The participants were not selected based on their length of stay. This was because movers between skilled jobs seem to be more mobile (SVR, 2015), and the length of stay of participants at the point of the interview varied between 4 months and several years.

#### *3.8.1.3 Parameters for selection of Portuguese participants*

In the third case study, again the point of interest was to conduct a study on the determinants across both skilled and unskilled labour migrants. The total number of participants for the Portuguese sample consisted of 18 participants. 12 out of the 18 participants were employed in the low-skilled sector, whereas the remainder of the group were employed in unskilled jobs.

### 3.8.2 Accessing the participants

At the beginning of the field research, the researcher contacted a gate keeper for the Polish and the Portuguese group. Both of the gatekeepers were known to the researcher beforehand by direct observation. The gate keepers directed the researcher to other potential participants. Once the researcher had established an idea of where and in which types of works the interviewees were occupied and the sources for contacting more people diminished, the gate keepers were abandoned. The strategy was to visit the places where potential participants might be encountered based on previous information from other participants. Overall, there were no issues in gaining participants' consent for interviews, especially after addressing the interviewees by their names at the first encounter; names were obtained from the referring participant. This was one of the advantages of the snowball system. Approaching potential participants by their names allowed the researcher to build an immediate relationship with the participants, thus making it easier to convince to sit for an interview. Regarding the German group (all types of participants) and the skilled Portuguese labourers, the participants were contacted through the use of social media such as Facebook or by relying on the personal social network of the researcher. Snowball sampling was employed to identify all relevant actors or respondents who could provide information about relevant actors.

Language was not as serious a barrier as originally feared. The ability of the Polish migrants to express themselves in English was relatively good. Although the language skills were far from perfect, the impression of the researcher was that in general, the participants could say whatever they wanted to say. This surely has to do with the fact that the average age of the Polish participants was quite young. Regarding the second group, language barriers were eliminated entirely as German is the native language of the researcher and the interviews were held in German. Regarding the third group, the Portuguese group, the language skills were again quite good and thus in general no problems arose. Particularly with the Portuguese group, it was possible to conduct long interviews, as they could express themselves quite well and had much to tell. In short, translators were not required.

The Polish sample group in this study was limited to migrants who work service jobs in the retail and restaurant / catering areas. This study could have widened among the

participants across the sectors. However, it did not for three reasons. First, the study was informed by and relied on previous information, which indicates that Polish labour migrants are mainly concentrated in the tertiary sector. Second, through the methods of snowball sampling, the researcher was most of the time automatically referred to friends or acquaintances working in similar sections. Third, it was much more convenient to identify migrants in the tertiary sector, as the potential participants were mostly quite visible immediately upon entering shops and restaurants. As a result, the samples in this research are limited to restaurant and shop assistants (which make up the largest working sector of Poles anyways).

### **3.9 Potential weaknesses and strengths in the interview process**

As most migrants interviewed had been in the UK for a considerable amount of time, their responses during the interview may not have reflected exactly the exact same intentions and thoughts they had in mind at the point when they arrived in the UK, as perceptions may change over time. Most of the time, participants had stayed in the UK longer than they had originally planned. Polish migrants are subjects who migrated at a specific time with specific intentions. Those intentions are dictated by macro-level determinants. The exposure to details on the micro level, especially details experienced after arrival, may lead migrants to unconsciously modify their memories about their original motivations when answering the questions in the study. For instance, the participants quite frequently mentioned how spare time for leisure activities was important as well, but they might not have been aware of what to expect regarding social activities before their arrival to the UK. Their experience with the social activities after their arrival may have contributed to their understanding of their personal preferences; in other words, they may have started to value free time more once they had the chance to experience the social life in their new destination country. Nonetheless, even though micro-level details may have altered their perceptions, the likelihood of large modifications to memories of the original thoughts regarding their motivations is still not too high. In any case, the qualitative data has shown that economic motivations for the Poles were the main and most fundamental reason for migration, a finding which is validated via secondary material.

As qualitative research is highly reliant on the researcher as the instrument for data

collection, reflexivity arises due to the relationship that is structured throughout the course of the research (Miles & Huberman, 1994). Assumedly, more similarity regarding the personal profiles between the researcher and the interviewees yield to more data in the participants' response during the course of the qualitative data collection. While interviewing, personal biases and preconceptions may come into play that can affect the research (Bryman, 2008). Regarding this reflexivity and bias issue, the following circumstances certainly added to the ease of the interviews in terms of extracting answers from the participants: 1) the researcher is a kind of a migrant to the UK herself, 2) the researcher's background or profile as a student as opposed to e.g. an authority group, which helped to generate empathy, 3) the researcher was in about the same age group as participants. In particular, the participants from the German group seemed to feel quite relaxed when answering the questions, as the researcher shared the same nationality. The participants may have felt more openness as the researcher had gone through or shared a relatable situation. The fact that there was no translator in the two other groups used may be of advantage as they may have felt their anonymity was more protected.

### **3.10 Analysis of data**

The qualitative research software NVivo was used to analyse the data from the interviews. The content was coded according to themes that emerged while doing the research. As Bryman (2008) noted, coding is the starting point for analysing most forms of qualitative data (p. 550). The process of making sense of empirical data has been guided by some of the points that Bryman, with reference to Lofland and Lofland (1995), lists as a general guide to coding. These points advise the researcher to contemplate what general category each item of data falls into; what the item of data typifies; what query about a theme each item of data responds to; what sort of response to a question about a theme each item of data implies; and what kind of event is going on (Bryman, 2008, p. 550). The data was coded during the process of transcribing the interviews. The sequence of the sections in the evidence chapters (Chapter 5, Chapter 6, Chapter 7) evolved according to the importance of the codes, which in turn were based on the density and frequency of the answers. Codes were continuously reviewed in light of the developing conceptual framework and modified if necessary. Importantly, after the coding of the data, the findings were

interpreted in light of the research question and related to existing theoretical concepts.

Criticisms of using coding as a tool for analysing qualitative data include the danger of losing the context of what is said, and the fragmentation of data leading to the loss of the narrative flow of what interviewees have said (Bryman, 2008, p. 553; Coffey & Atkinson, 1996, p. 23). These criticisms are addressed by keeping linking the codes thoroughly to each other section by section, so that the general context was kept in mind and did not get lost. Moreover, the triangulation of the information with secondary data and with other sources helped to keep the focus of the codes on a constant level.

### 3.11 Generalisation

The theoretical framework explains how migration levels respond to the standard of living defined by convergence levels based on economic indicators on the basis of the three case study countries Poland, Germany, and Portugal. In addition, this research study hopes that the findings elaborated for the three case studies can be generalized to other member states of the EU with the respective economic profiles. The remaining EU member states can be broadly categorized according to each one of the three case study countries. Although some variables when migrating may vary, and other variables which were not considered in this study may be added, for instance, external variables such as political factors, still, the fundamental tenet of this research study that labour mobility responds to convergence levels may not change in its applicability. The likelihood of the interference of other external variables such as political factors is not high, as by becoming a member state, entities undergo not only economic convergence, but also social and political convergence, which diminish the possibility of severe political frictions. Other than variances in politically related variables, which may deter the interrelation of convergence–migration, other variables, which have not been mentioned, may turn up. However, the likelihood is low as the determinants have been extracted from multiple various theories of migration, and generally, these theories include all the variables, which are important within the context of migrating. In addition, the findings may also be considered in future policy proposals in the EU on migration



and mobility. So far, the attempts to increase mobility levels via the removal or reduction of barriers have been less effective (e.g. Zimmermann, 2011).

As using qualitative methods traditionally involves smaller sample sizes, researchers are often cited for errantly generalizing their findings to a larger group of people by considering their sample to be representative of the larger population (Hume, as cited in Campbell & Stanley, 1963). This weakness makes the field of social science inherently limited. This particular issue, namely the generalization of findings from qualitative studies with small samples, has been the focus of extensive sociological research over time (Firestone, 1993; McGrath, 1982; Payne & Williams, 2005). For instance, using an approach similar to the methods of this research, Payne and Williams' (2005) research established various conditions, which allowed qualitative data that was statistically not representative to be generalized. Therefore, whereas some social scientists may find that the results from a study with small sample sizes based on (semi-structured) interviews represent only one, unique case, other academic groups consider these findings as applicable to a larger group as long as the limitations are adhered to.

The 61 interviews were held with migrants working majorly in the central parts of London only. London, being a highly cosmopolitan city, may be an attraction itself and thus a pull factor for people coming from abroad to work. For instance, the German sample group mentioned quite often that 'attraction' of the city was a major motivation. This particular feature of the city as an exogenous variable may have been influential over major motivations and may have contributed to the modification of the responses. At the same time, one must add that if people living interviewed were somewhere else, and if the exogenous variable 'attraction of the city' was non-existing, then, most probably, the replies would still revolve around the major determinants, namely economic motivations. One of the strengths of this research is that it pointed out the single 'most important' and predominant variables behind the migration process among many others, as opposed to studies who identify the importance according to the frequency of the same replies. The Polish did not cite 'attraction to the city' as a major reason, so the probability that the answers were affected by exogenous variables is less likely, as shown by the results. Henceforth, the characteristics of this sample may vary in comparison to the characteristics of

Poles from other samples in other locations and at the UK-wide level. However, by establishing the following specific requirements and guidelines, and by focusing on following these guidelines, these limitations were largely eliminated:

- The researcher focused on Polish migrants who came to the UK in the post-2004 period within the framework of convergence and social cohesion.
- The researcher selected participants who came exclusively to ‘work’, and not to study. Indeed, sometimes labour migrants are disguised as, for instance, nannies or transnational migrants. However, as this research was interested in labour mobility, disguised migrants who had come for other reasons, but had used work as an excuse to come, were less important for this study.

One of the advantages of semi-structured interviews was that it was possible to ask follow-up questions whenever necessary. If the participant veered too far from the main question, with the help of a guidance question, it was not difficult to guide the participant back to the right point. Semi-structured interviews allow the interviewer to dominate the interview when necessary. The questions were structured neutrally so that the answers to the questions would be as natural as possible, and the researcher made an effort to interpret the data as transparently as possible. The expectations of this research were around the baseline data that was needed to further the research, and the expectations were met thanks to the varying questions.

### **3.12 Ethical considerations**

The study was granted ‘full approval’ by the King’s College Research Ethics Committee after being classified as a ‘not high risk’ project. The interviews were conducted in full compliance with the Ethics Panel’s guidelines. Before commencing with the interviews, the participants were given a sheet of information about the research project as well as the ethical standards and process of the interviews. The sheet of paper also contained the contact details of the researcher and the supervisor. The participants were informed about their rights and assured that the interviews would be handled in a confidential way. Once consent was given, the interviews took place. All interviews were anonymised by using pseudonyms, and the data was handled according to the ethical procedures. The details of the interviewees were kept safe and stored separately from the coded data.

### 3.13 Summary and conclusion

This chapter established and discussed the methodology of the dissertation. In particular, it addressed the selection of the interviewees, the case study selection, and how the gathered data was used in order to answer the main research question of the thesis. The chapter showed that in order to answer the research question, the most appropriate method was to include data from participants with different economic backgrounds. Poland, Portugal, and Germany, countries with a substantial number of migrants in the UK, were chosen in order to increase the external as well as internal validity of the data. Their migration and economic backgrounds were contextualised in each case study and triangulated with primary data.

## **Chapter 4 Identifying the determinants behind high migration levels under the convergence framework: Polish labour migration into the UK after the EU 2004 enlargement**

### **4.1 Introduction**

This chapter focuses on the application of the migration theories to the Polish participants, i.e. Polish labour migrants in London, described in the methodology chapter above. The results from the data are not itemized according to variables. Instead they are categorized into themes that evolved during the evaluation of the data and are sequenced according to their relevance. The first section below contextualizes and analyses Polish labour migration within the neoclassical theory of migration. The following section identifies the characteristics of the labour markets and the effect of those characteristics on Polish migrants. The third section scrutinizes the significance of network theory in this context, and the fourth section identifies and discusses the social factors and their relevance for Polish workers. The chapter will close with a brief summary and statement of conclusions.

### **4.2 Application of the neoclassical theory of migration and post-2004 enlargement: Migration to ‘search for a better life’**

The core interest of this study is to investigate and define the primary factor behind the migration of labour migrants in the EU according to regional differences. Therefore, this section begins this chapter by analysing the motivations of the first sample group, namely the Polish labour migrants, whose country is still experiencing convergence. Existing statistical data indicates that the motivations of Polish labour migrants are mainly economic in nature (e.g. Heinz & Warmedinger, 2006; Durstwater, 2013). To complement this statistical data, the empirical aim of the study was to capture migrants’ most natural and intuitive answers through face-to-face semi-structured interviews and to explore and elaborate on the migrants’ personal perceptions of their motivations. The study aimed to avoid making assumptions and diagnoses via the use of purely quantitative techniques. Before conducting the interviews, the interviewees were familiarized with the theme, but they were not informed about the questions in advance. This enabled the researcher

to collect data from unmodified and natural responses, as the participants were not given the opportunity to prepare their answers beforehand. For each group – the most quintessential query of interest was to learn about their very principal and intuitive motivation to migrate to another EU country to work. After some brief small talk, the researcher opened the formal interview by beginning with following lead question: ‘What was the main reason for you to come to the UK?’ or ‘Why did you come to the UK?’ The intention of this question was to capture a ‘very instinctive’ chain of thought and to thereby reveal the principal motivation.

Regarding the Polish sample, the principal motivation was income or work related. The answers to the initial question were straightforward and generally unanimous. The immediate response to ‘why did you come to the UK’ commonly was related to ‘to have a better life’:

*I think the main reason was just to search for a better life I believe.  
(Milosz)*

*To have a life (Ada)*

Polish migrants evidently came to seek a better life. The majority of the sample provided the same motivation by mostly using the wording ‘to have a better life’ or even just ‘to have a life’ in their responses. Whereas to have a life can be associated with an improved standard of living, to have a better life might be related to the quality of life. Nevertheless, in both phrases implicate ‘improvements’ in their lives through increased income, and thus will be regarded as similar motivations. Once all the answers to the first question were coded, after a thorough examination and detailed evaluation of the feedback to the opening question, the researcher found that although the answers naturally varied in syntax, the content of all answers implied pursuit of an ‘improved’ well-being, which at least enables them ‘to exist’ (Marta). London proved the migrants with a better alternative, and therefore making migration worth the risk:

*So I took the risk of just going abroad to see how it’s going in the other country because it’s always better there. (Milena)*

Quite frequently, participants referenced a ‘better job’ and ‘more money’, and they rarely mentioned ‘no job’ or ‘little payment’. Relying on the contextual analysis, living a ‘better life’ was majorly dependent on the variable of ‘employment’, which is in turn is dependent on payment, i.e. ‘income’. In any case, the main argument in the answers was in some ways linked to determinants of an economic nature. As the following sub-sections show, the income variable was the most prominent one. The migrants were basically pulled to the UK due to the perceived strength of the economy. The initial results seemed to underline the data from the existing literature. Social reasons, or any form of linkage to a social activity, were never mentioned in their very first and intuitive response. This does not mean that social factors are not important at all, but they do not represent a major reason for migration. As outlined in the methodology section, this research determined the importance of a variable first according to the order in which it was mentioned in the initial response, and second according to the emphasis assigned to the variable during the rest of the interview. The next sub-sections of this section further unfold the various variables behind the determinant ‘a better life’.

#### 4.2.1 Work-life balance or the ability ‘to have a life’

The desire ‘to have a life’ was noted constantly throughout the whole of all the interviews. Therefore, this study considers this determinant as a highly significant element of migration, which requires detailed scrutiny. The notion of ‘having a life’ can be interpreted to as having a better social life, and often relates to having more free time for leisure activities, an improved work-life balance, and flexible hours and promotion at work. In the case of the Polish labour migrants, these final goals cannot be achieved through the availability of more income; the opposite was true for the final goals of the German migrants working in London, as will be shown in the next chapter. Henceforth, ‘to have a life’ is economically bound rather than socially related. The desire ‘have a life’ does not necessarily compose a determinant, but it is related to income through various channels. The remainder of this sub-section depicts how the synthesis of these multiple channels influenced the Polish migrants’ decision to migrate.

#### 4.2.1.1 Unfolding the meaning of 'to have a life'

Within the context of Polish labour migration, 'having a life' can be interpreted in terms of having shorter working hours with better pay and thus a specific minimum level of standard of life. In high-income nations in the EU, such as Germany or the UK, professionals commonly report having 'no social life' due to doing overtime to reach career aspirations. Polish workers, in contrast, feel obliged to work overtime due to lack of financial means. Hence the reason for working long hours is fundamentally different.

By the exposition of the interviews, 'having a life' was detached from the idea of attaining an increased standard of life through financial means, which can be in turn linked to the neoclassical theory. While explaining her situation, Milena made a comparison between her previous life in Poland and her life in the UK. She underlined that back in her country, she felt that she existed merely 'to earn money in order to pay the costs of life'. In contrast, her life in London allows her to spend more time on social activities, for instance going to the pub, something she was not able to do in her origin country. She considered this freedom almost as a 'luxury'.

*Here you earn money you can go to pub or stay around. In Poland it's not, you only earn money and you pay for rent and nothing, that's it. (Milena)*

Martyna added that back in her home country, she had no 'flexibility' at all, and she stated that she came to London not only to earn more money, but also in order to 'have a social life', which she had not enjoyed at all in Poland. Mateusz, who arrived to London as a young graduate, chose to accept a catering assistant job. He was more concerned with his standard of life than with the job itself. Although being employed in the low-skilled sector is in contradiction with his qualifications, he was happy to have a higher life quality through his job and environment. The responses of Milena, Martyna, and Mateusz all imply that a low-skilled job in the UK seems to provide more satisfaction for the overall standard and quality of life.

Achieving a better standard of life, therefore, seems much easier in London and involves less effort according to Mateusz' experience.

*In Poland I would have to make much more effort in order to reach the same status of life like I have here, you know, which is gonna be here. (Mateusz)*

Indeed, Migration Watch calculated that a Polish family living in Britain could save a fifth of what they take home and still enjoy a better lifestyle than they did in Eastern Europe (Migration Watch, 2015). In other words, even modest savings would allow Polish workers on the minimum wage in the UK to save what they would earn in perhaps an entire year at home. Therefore, the much higher benefits for families in the UK compared to those available for families in Poland act as a significant pull factor.

Milosz had a full-time job for 5–6 years in Poland, which indicates that he did not have unemployment issues before coming to the UK. However, what seriously concerned him was his lifestyle. He explains, ‘I was working, but I just wanted to have a better future. Because it was like work, but it was for surviving, you know’. Milosz reported his lack of free time as one of his major concerns during his decision-making process. Marlena had moved back and forth between Poland and the UK three times to earn money for her studies before she decided to stay permanently. Despite having held two jobs in Poland, her income had been insufficient to cover her living costs. She precisely describes how her lifestyle was affected by the long working hours and lack of free time:

*I was coming [to the UK] to earn a little bit for the university because I was studying at the weekends. That was very expensive. But still I had two works and it was not enough. And I was coming like three times before. I was working in the car wash. I was helping the friends who had the company with the houses, who does the finishing of the walls, something small things. And things like this. That's why when I made the decision, when I thought like... I don't want any more life like this, most days work, like seven days per week. For over two months, I had no day off. For two months. I was feeling like... you know like, something was going wrong in my head. . . . But you know, the money as well they [the jobs] did pay for this. But after two months working non stop, it's too much. (Marlena)*



Like Milosz, Marlena did not base her decision-making process on unemployment; rather it was the correlation of the low-income levels with very long working hours that did not leave spare time for social life and daily activities. The low-income levels practically caused a hindrance to invest more time not only in social activities, but also in family duties. When working long hours on a permanent basis, Marlena was unable to spend time with her son:

*I was studying at the weekends. On the weekdays, I had two jobs. I was working the whole day. From eight o'clock until eleven in the night. I saw my son only in the mornings when I was taking him to the nursery. Income is less there. (Marlena)*

The income levels evidently presented a restriction on the social activities, or moreover, caused a barrier for interaction with family members. Based on the observation from the interviews, the situation can be depicted with the following chain of action:

Insufficient or low income → Excessive work hours → Lack of social life → <b>Migration</b>
--

As their income levels were insufficient to cover living expenses, participants were forced to work in multiple jobs in order to secure their lives. The employment in multiple jobs, generally in two, consumed more time, and there was little availability remaining for free time for social life. Given this situation, the individuals chose to move to regions with improved income levels or to regions where income–living costs were better balanced and overtime was not required to cover the living costs. This move enabled the migrants to profit from a far better work–life balance.

Moreover, availability of free time simultaneously meant that the individuals were now able to spend more time on their daily needs and interests. Sometimes they stated how they used the time to invest in their human capital by, for example, taking up courses in various fields or visiting language schools. Maja and Milena specifically mentioned that, in the later stages, when they started to feel more confident about their language skills, they dedicated the extra time resulting from flexible working hours to academic courses. Hence this can be also regarded as a

contribution to a better quality of life. However, this use of free time was mentioned infrequently and was emphasized less in the interviews, which means that investment in their own qualifications had no priority at that point of time. Prior to their arrival to London, these kind of ‘privileges’ were practically impossible, as they ‘didn’t have time to do nothing’ (Martyna) because ‘there was too much work in Poland’ (Marlena) due to multiple occupations or weekend jobs.

It is noteworthy to underline how much migrants were concerned about their future lives. Moving to another EU country to work was often regarded as an investment in their own future. Apparently, any opportunity that allowed them to leave Poland seemed to be a profitable option. In particular they reported ‘not many opportunities in Poland’ (Adrianna). Prior to their migration, the participants had possessed a pessimistic view about their own future; they spoke of ‘experiencing lack of prospect’ or feelings of being ‘stuck’ (Maja).

*I used to work hard as well back in Poland. I didn’t come only because I want to work less. I just wanted obviously to invest in the future, in terms of learn the language, English, that was my first plan. I wanted to see the world and travelling. From London, you have an opportunity to go everywhere, you have more connection to go everywhere. From my country I could not even whole year save the money to go somewhere once a year. So I jeopardized just to go abroad and to see how it’s going in the other country because it’s always better there. (Milosz)*

Along with the discussions on the future, certainly another realm of interest was the degree of satisfaction with their current workplace and life. Overall, on a comparative basis in terms of their work in Poland, the majority was very satisfied or happy with their work in the UK, as well as with their lives in the UK. This was true for all the migrants from the Polish sample, independent of age, gender, or even length of stay.

*I have my life here and I’m happy. I can do more here than in Poland. (Adrianna)*

*For me I would say it’s perfect for now. (Milena)*

Although the sample size was based on migrants who work in the low-skilled sector, the migrants were happier and more satisfied than they had been in their previous lives in Poland. The migrants were not asked about details in relation to their wages, but they were asked whether they were happy with their current income. The overall answer was ‘yes’, with very few outliers. They seemed to enjoy the moderate working hours compared to the hours in their previous jobs in Poland, as they could now achieve a better work–life balance. Another reason why they were happier in their current work than they had been in their work in Poland was the availability of promotion prospects at work, an opportunity which they stated was generally lacking in Poland. A few of the labour migrants brought up in the interviews that they liked the idea of promotion prospects at their work place, e.g. the possibility to become a shift manager or to be promoted from a team member to a ‘professional barista’. In relation to their jobs, Polish labour migrants felt that they could accomplish more in the UK than they could in Poland:

*Here I can start low but get a better position if I want. I can become a team leader or manager. (Adrianna)*

Surely, such appealing conditions and advantages in the labour markets with promising future prospects in the UK may have contributed to their decision to stay in the future rather than to return to Poland.

In summary, in the interviews, ‘a better life’ was often linked to different variables related to various kinds of personal matters, in order of importance, namely social activities, promotion at work, and current mood or satisfaction at work. Essentially, the specific desires can be classified under the concept of work–life balance. Although these factors were important as well, still, the main object of the Polish migrants was to ensure a stable life through increased income. The improvement of life can be linked to increased availability of time. The availability of time for leisure activities or family duties, in turn, is affected by the working hours, which are required due to low income. The Polish workers thus migrated in order to break out from the vicious circle induced by wage gaps or low wages.

#### *4.2.1.2 Implications of the variables 'higher income' and 'wage differential': Polish labour migrants in converging regions*

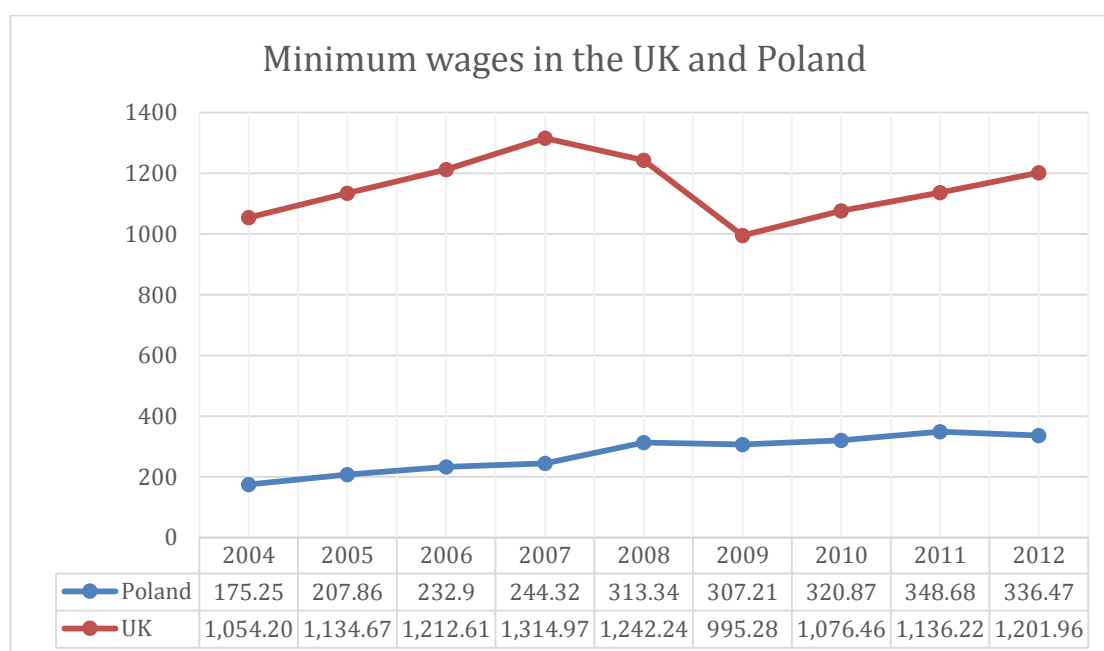
The introductory question served well as a starting point for the interviewees and paved the way for the continuation of the conversation. During the course of the interviews, the participants could touch upon any issues they desired to talk about. However, overall, the conversation can still be categorized as a guided interview. The researcher did intervene from time to time, especially when the researcher felt that the interviewee was deviating too far from the main theme. By posing a mixture of open-ended as well as closed, semi-structured questions, the researcher ensured that the conversation revolved around the pre-set orientation line, which kept the interviewees focused on the main theme. By the nature of the empirical design, it was necessary to address all the determinants of migration, economic as well as social, inclusively. If the interviewee did not make any reference by himself/herself to a determinant, then the researcher would interfere by asking directly about the specific variable. Any theme revolving around the 'income' variable can be described as at the heart of the empirical part of this thesis. It is important to mention that in the majority of the interviews, the migrants addressed the income variable by themselves based on their own initiatives and without any preceding indications regarding wage differences. This finding underlines the presupposition that they came in order to profit from better income levels, as suggested in the majority of the literature (Galgoczi et al., 2009; Baldwin, 2010; Portes, 2012). Sometimes, the researcher also asked the participants directly about income by asking 'Do you earn better here than in Poland?' or 'Is your income here better than in Poland?' The prevalent response, in almost all cases besides a few exceptions (which will be discussed in the subsequent paragraphs), underlined the economic motivations to move by providing a positive 'yes' answer, thus confirming the neoclassical theory, namely that migrants move for the sake of increased wages.

*Income is less in Poland. Wages are much better here, so I came here.*  
(Marlena)

*I came because it is better here, I can save more money.* (Ala)

The principal motivation was clearly articulated and stated in the interviews, without any significant references to other factors. The Polish workers confirmed that the first and foremost reason to move was the attraction of higher income levels.

The findings from the qualitative data are well supported by the statistical data. Figure 4-1 shows the development of the minimum average wage rates in the UK and in Poland. In 2004, when Poland joined the EU, the monthly average minimum wage in Poland was 175.75 EUR (Eurostat) compared to 1,054.20 EUR in the UK. By 2014, the average minimum wage in Poland doubled and reached 404.40 EUR, but the wage in the UK increased only by a minimal percentage to reach 1,251.05 EUR. Despite the 100% increase regarding the average minimum wage, there still existed a significant wage gap between the UK and Poland.



**Graph 5-1 Development of the average minimum wages in the UK and Poland from 2004 to 2012**

Source: Eurostat, 2015

The UK experienced a decline after 2007 with a nadir from 2004 to 2012 reaching its lowest point in 2009. Poland, in contrast, experienced only a minimal or almost no decline, hence converging towards the UK minimum average level in 2009. The previous chapter four on migration levels showed how migration levels into the UK declined after 2007-08. There is a correlation between the convergence level of

minimum ages and migration levels. The subsequent paragraphs provide further exemplification of the same phenomenon by looking at other economic indicators.

If wage gaps constitute the main differential behind the migration levels, this may be why the migration levels from 2004 continue today. The interviewees strongly portrayed how the lack of time for social activities was very important. When sufficiently similar standards of living are achieved, a significant decrease in migration levels can be expected. The neoclassical theory of migration prescribes that migration will continue until no wage differentials exist. Migration Watch has calculated that an adult with a spouse and two children who earned the minimum wage in Britain would receive 543 GBP a week, or 28,200 GBP a year, in salary and benefits including child tax credit and housing benefits. Using Purchasing Power Parity data to compare earnings across the different countries, the think-tank estimates that in Poland, a family on the minimum wage would receive about 145 GBP per month. Those on an average salary would receive just 235 GBP a week in Poland, less than half the minimum wage and benefits in Britain (Migration Watch, 2015)

According to the International Labour Organisation (2010) (ILO), pay in the UK was much higher than in Poland. The minimum monthly wage (expressed in USD using purchasing power parity [PPP] in the UK) was 1,507 USD. In Poland, it was 628 USD (ILO 2010). A McDonald's cashier or crew member earned an hourly wage rate 5.5 times higher in the UK. Even accounting for differences in price levels, the gap was still significant: a British employee of McDonald's could buy 2.11 Big Macs for his/her hourly wage while a Polish employee had to make do with less than one (Ashenfelter & Jurajda, 2001). Empirical as well as statistical data support the theoretical literature and the tenet of the neoclassical theory, which claims that individuals move due to differences in the wages. After the lift of the restriction, as the section above has shown, an immense number of Polish labour migrants moved to the UK in the first year and still continue to move to the UK today. The descriptive statistics are in compliance with the qualitative data, as well as with the neoclassical theory. For instance, Julka asserted in her interview that she could have obtained a position back home. However, the certainty that income levels in her origin country would not exceed the income rates in the third sector in the UK

convinced her to migrate. The poor performance of the national economy and the resulting dissatisfaction with it was undoubtedly a push factor for the Polish labour migrants to move to developed regions with higher earning prospects, under any circumstances. In order to earn more in the low-skilled sector in the UK, the labour migrants abandoned the idea of finding jobs suitable to their qualification levels. This schematic behaviour has led to what is known as over-qualification in the labour markets.<sup>49</sup> In this case, over-qualification is not due to the limitations in the receiving country; rather, the phenomenon has its roots in the origin country. Over-qualification, in the Polish case, is therefore a problem that is ‘imported’. The literature on east-west migration discusses to a large extent how Polish labour migrants in the UK market are known to be highly educated or skilled, but are largely represented in the low-skilled sector (Johnston et al., 2010; Khattab et al., 2010; Phung, 2011). Polish labour migrants draw their conclusions to move or not to move explicitly on the basis of the comparison of income levels, independent of the migrants’ sectors or professional areas. This preference shows how the variable ‘income’ is the paramount factor and exceeds all other remaining contemplations, confirming the implications of the neoclassical theory of migration.

*I had two works and it was not enough. (Marlena)*

*Income was low. No, just to pay the bills, that’s it. (Milosz)*

*I was working in the Police Department. Not like a Policewoman, but in the office. And then I was working in the petrol station. It was so bad when it came to money, and not many opportunities. (Amelia)*

*I was studying at the weekends. On the weekdays, I had two jobs. I was working the whole day. From eight o clock until eleven in the night. I saw my son only in the mornings when I was taking him to the nursery. Income is less there. I wanted to provide my son a better life. This was the main reason. (Martyna).*

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<sup>49</sup> Qualifications are certified skills acquired through formal education (Quintini, 2011a). A worker is over-qualified if the highest academic and/or vocational qualification that he attained exceeds the maximum qualification requirement of the job that he does (Felstead et al., 2007; Quintini, 2011b).

*Ehhh... it's difficult to say. It depends if I work probably what I was studying then I could earn more money, good money. But then if I work like here, it's not comparable. (Basia)*

For instance, a weekly minimum wage for an individual in the UK who has a dependant spouse and two children, including benefits, would be 543 GBP, or annually approximately 28,200 GBP. Thus, a weekly savings of 20% equates to 110 GBP, which is worth 540 Polish Zloty. In Poland, a person in the same circumstances would have a weekly income of 375 Zloty (after tax and including benefits). Hence, if an individual could save 20% of their earnings in the UK, they would be saving almost one and a half times what they would have earned in total in Poland (Migration Watch, 2015).

In regard to the comparison of wages and income between the origin and the destination country, the Human Capital Theory (HCT) implies that individuals make a cost-benefit analysis before they decide to migrate. During analysis, this study attempted to determine whether the HCT applied to the Polish east-west EU migrants. Furthermore, the study sought to determine to what extent the migrants were knowledgeable about income levels in the UK prior to their move. Was their arrival to the UK based merely on 'hope' or 'assumptions' that they would earn more, or had the migrants been precisely informed about the extent of the benefits available if they chose to migrate? The results indicated that the migrants did not undertake detailed research on income levels before their departure. Rather, the perception that income was much lower in Poland provided a plausible reason to leave their home country. The migrants thus relied on their confidence in this perception without performing an extensive cost-benefit analysis. Their dissatisfaction and the existing difficulties constituted a sufficient factor to migrate. Based on the poor performance of Poland's national economy, detailed risk calculations seemed superfluous. Social networks in the destination country occasionally may well have served as a source of information and comparison.

Moreover, noteworthy to mention is the observation that labour migrations in larger numbers are generally observed among 'unskilled labourers'. Contrariwise, skilled labour mobility is scarce. These trends represent an issue on a global level. However, the pattern of Polish labour migration into the UK reveals an irregular



exemplification of the phenomenon. The exploration of the literature has revealed that Polish labour migrants are known to be skilled or highly qualified (e.g. Durstwater, 2013, Okolski 2014). This observation is in accordance with the composition of the participants in the sample size. The participants were selected on a random basis, but the majority possessed a university degree or was going to university. The demographic profile from the existing literature was thus confirmed and again underlines the argument that the migrants came here for the sake of higher income. The migrants are thus willing to take up less-skilled jobs in order to earn better. Basically, wage differentials and increased income provided a good attraction for mobility and are the reason behind high levels of mobility.

Ensuring a safe future for oneself by accumulating savings was also a frequently noted motivation to migrate. In Poland, it was just not possible for the participants to accumulate any savings at all. Thus, the perceived insecurity in relation to future lives due to less economic means was also a trigger to move.

Although the unemployment later fell quite rapidly to 10% in 2006, in 2004 the levels were as high as 20% (EUROSTAT, 2015). Despite this figure, after Poland became a member state of the EU, unemployment as a determinant for migration was hardly addressed at all, let alone as a primary reason to move. The date of arrival to the UK of the participants who were interviewed varied from 2004 to 2012, which may explain why the interviewees were not strongly affected by unemployment in their origin country. Since 2004, unemployment has remained slightly below the EU average (EUROSTAT, 2015). Conclusively, the reduction in unemployment suggests that a major driver of Polish migration has been the higher standard of living in the UK. The potential to build savings in the UK was also a highly important factor.

The intention of this section was to depict the main purpose behind Polish labour migration to London. The face-to-face interviews of the Polish sample indicate that 'higher income' or 'wage differentials' were the primary motive behind the participants' migration to London. Almost the entire sample confirmed the proposition from the neoclassical theory of migration, namely that individuals move for economic reasons. To capture the implication from the data briefly, firstly, as shown in the previous sections, the Poles constitute a migrant group with 'high

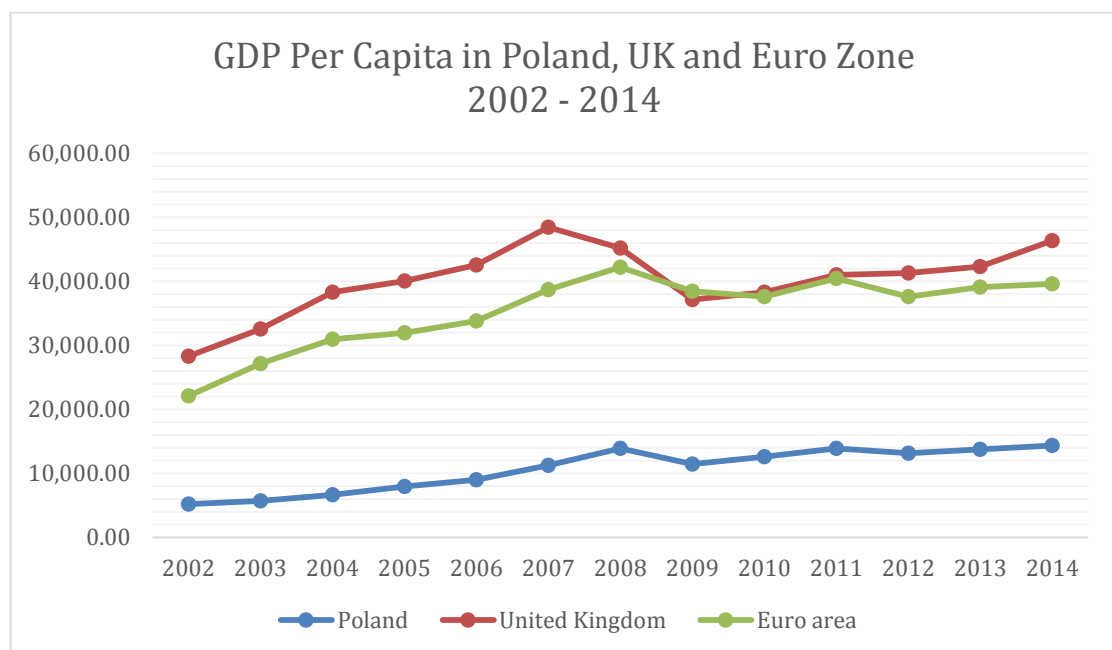
mobility levels'. Secondly, their tendency to constitute a highly mobile population is explained on the basis of income levels. Contemplating these two factors embedded in a broader context, the interrelation between the two observations leads to the understanding that mobility is a phenomenon which takes place between converged and non-converged regions. Hence, the first and most important condition, as illustrated in table 3 – 1 in chapter four, of this thesis is met, confirming the hypothesis.

The distinctiveness of this research study lies in the contemplation of labour migration specifically within converging regions. This section addresses the following sub-research questions: How do the GDP levels relate to the motivations of the Polish labour migrants? How can the macro factors be linked to the economic behaviour of the social migrants? How are these factors related to each other? How do migrants value the changes in wage levels from the levels in their origin country to the levels in new country? And how may migrants react to future changes? Would they move back? The exploration of these questions will add further substance to the main hypothesis.

The first question of interest tackles the convergence argument: Firstly, what would migrants have done if they had been earning more in their origin country? Would they still have migrated? Secondly, if the origin country experiences convergence (i.e. if income levels of the origin country converge with the average), would the migrant then move back? What would the relationship to income and migration then be like? Within the framework of this research study, Poland provides a suitable prototype, in particular because of its length of membership in the EU.

The Polish labour migrants stated that they came to 'search for a better life', which indicates a desire for improvement regarding a particular life condition. In economic terms, a better life can be translated in an increased availability of financial means or, in other words, it is equivalent to earning higher wages; high wages, in turn, are relative and depend on the strength of the national economy. More theoretically, 'better lives' can be found more in converged regions rather than in converging regions. In order to express the degree of convergence, this thesis will consider GDP per capita levels, which is the most frequent indicator of a country's standard of living according to the European Parliament.

According to the statistics World Bank (2015) Poland had a GDP per capita of 6,639.89 USD when it joined the EU in 2004. The UK's GDP per capita was almost 6 times higher at that time, at 38,309.84 USD, and the EU average was at around 32,000.00 USD in 2004, which makes Poland's GDP per capita about 20% that of the Euro Zone when Poland joined the EU. The literature attributes the mass migration levels after the lift of the restrictions in 2004 to the large economic differences. From what the participants stated in the interviews, the results of this study comply well with the descriptive data. The GDP per capita continued to rise in Poland, higher than the average rates in the EU (as expected). As discussed in the previous section, a faster rise than the average means convergence. Hence Poland is in the process of converging with the EU average rates, as convergence in this study refers to a developing country's GDP rates increasing at rate faster than that of the developed nations. Poland reached a GDP per capita of 12,876.46 USD by 2012, meaning that it doubled within 6 years time. The UK's GDP per capita, however, had not changed much, remaining at 41,053.74 USD. The migration rates from Poland to the UK declined, as outlined in the previous sections.



**Graph 5-2 GDP per capita in Poland, UK, and Euro Zone from 2002 to 2004**

Source: Adapted from the data available via the World Bank's (2015) statistics

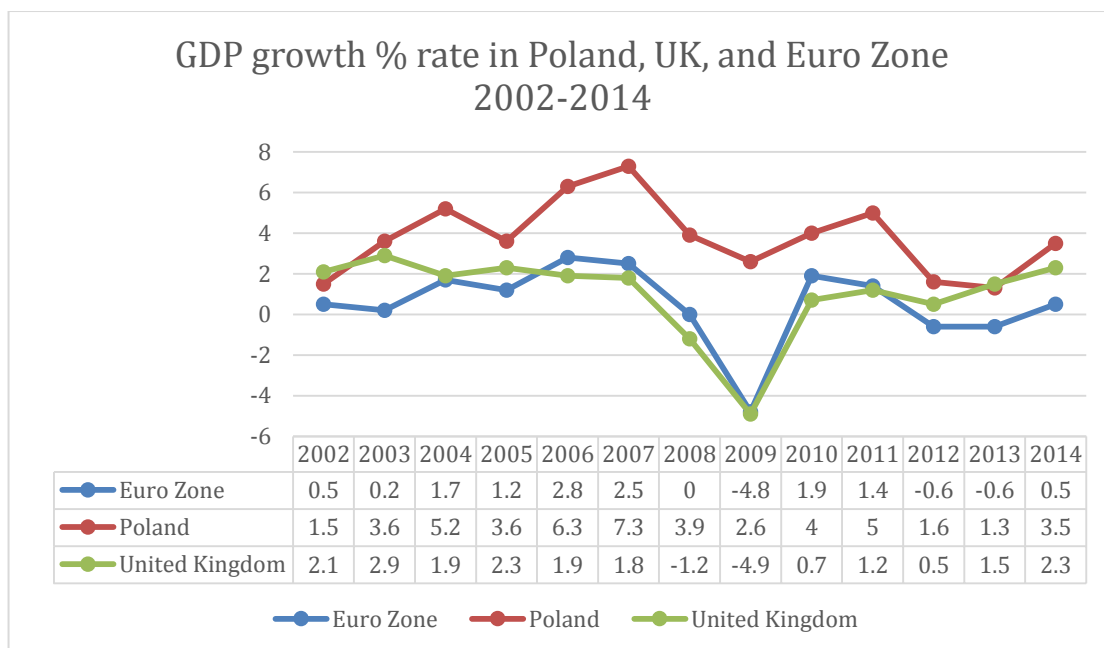
Development economics argue that GDP as an indicator may be deceptive, and it is not often considered as the best indicator, as GDP rates do not expose the distribution of wealth in the country. Other indicators may better explain the standard of living. GDP levels only provide a summary of the economic performance on an aggregate level. GDP levels provide information about the gross domestic product, i.e. about what the nation on average earns, and that may be insufficient to explain the relative average rise per person. In short, GDP per capita is not a measure of personal income. When comparing generalized differences in living standards, the preferred version is often using a PPP (Purchasing Power Parity) basis, as PPP reflects the differences in what people are actually able to buy with their money. PPP takes into account the relative cost of living and the inflation rates of the countries, rather than using only exchange rates, which may distort the real differences in income. PPP has its own drawbacks, too; it does not reflect the value of economic output in international trade, and it also requires more estimation than GDP per capita. On the whole, PPP per capita figures are more narrowly spread than nominal GDP per capita figures.

Income and wages are relative, and thus insufficiently explain what this research seeks to understand: namely, the perception of the ability to ‘live’, to afford a life, considering differences in the varying market values across the EU. When looking at the GDP and PPP of Poland, obviously and as expected, one can see that these values have risen over the years. At the point when Poland joined the EU, Poland’s PPP kicked off at 15,153 USD in 2006. The EU at that time had a PPP of 30,061 USD. The PPP of Poland grew steadily and reached 24,755 USD in 2014; at that point, the EU had reached a PPP of 36,326 USD. The difference of the PPP per capita figures was minimized from 20,038 USD in 2004 to 15,018 USD in 2014. Conclusively, regarding the PPP, this means that disparities were minimized as Poland economically converged.

At the present time, Poland’s economy is known to be successful and flourishing. The impressive economic performance can be attributed to the important reforms and structural funds granted by the EU which came with the accession, and which have deeply transformed the structure of the economy. Poland, despite some continued systemic problems, made substantial economic progress over the last

decade, and can now prove its success by being now ranked 23<sup>rd</sup> worldwide in terms of GDP nominal (World Bank, 2015) with the largest component of its economy in the service sector. Other sources claim of Poland's success that 'by 2013, the country had achieved levels of income and quality of life likely never experienced before' (Piatkowski, 2013). Despite the large success, nevertheless, Poland's GDP levels are still far below those of the EU average and the UK, which may well explain the ongoing influx of Polish labour migrants.

When asked whether they would have stayed if they had been earning the same value of income in their home country, the prevalent answer during the interviews was a very straightforward 'yes' (e.g. Ania, Julka, Maja), 'I would have stayed' (Basia). In reflection on the future, that means if convergence of Poland with the EU average continues, this would mean that migration is likely to decrease in the future. Indeed, the statistics show that Poland is already, however slowly, converging. Based upon this, a long-term prediction would be a decrease in migration levels. The financial crisis in 2010 shows how the migration levels respond to GDP levels: in 2008–2009, Poland was the only country that did not suffer from the crisis and the only country in the EU that demonstrated continued growth in GDP levels. GDP as well as PPP fell at the time in the UK (and in the EU general). However, GDP and PPP continued to rise in Poland, which means in economic terms, Poland converged with the UK (to a faster extent and stronger degree than in general). The primary data of this study indicates that labour migrants are receptive to economic changes and move if they feel that 'they will have a better life'. During the peak of the crisis, when the UK and the rest of the EU was doing worse, outward migration did not stop entirely but decreased significantly, as shown in Graph 3 – 2 in chapter four.



**Graph 5-3 GDP growth percentage rate in Poland, UK, and Euro Zone from 2002 to 2014**

Source: World Bank, 2015

The interviews support the claim that migration is elastic according to economic indicators, such as GDP per capita levels or GDP growth rates. The results from the qualitative data are thus in accordance with and reflect well the descriptive statistics and provide an explanation for them. The search for a better life, in numerical terms, can be translated into the increase in PPP, or standard of living.

Concerning the length of stay, the following pattern was detected among the Polish migrants: Strikingly, the interviewees either intended in the beginning to come for only a temporary period of time in order to earn some money, or the interviewees chose to stay in the UK after a holiday trip. In the latter case, the idea of staying and working was also absolutely unplanned. However, in most of the cases, both of the primary intentions turned out to be inapplicable. This was true for nearly all of the interviewees. Nearly all the Polish migrants responded that they initially came ‘for holidays’ only:

*So, the plan was like, to go abroad, save money, and to come back.  
(Amelia)*

*I was coming to earn a little bit for the university because I was studying at the weekends. (Monica)*

*I came here for holidays. And I sort of stayed. That was 8 years ago. (Mateusz)*

*My plan was to come and earn money just for holidays, probably then I would choose a place where you get easily, like my friend she went to Australia, at that time I didn't think of visa and stuff like that. (Adrianna)*

In a similar fashion, a further peculiar discovery was that all the Polish workers from the sample had the possibility to stay in the homes of their friends in the beginning. As they came for 'holidays', renting a place seemed unnecessary while staying with a friend enabled them to save money and time. Strikingly, even those few who came with the intention to work and not for holidays used their friends' homes until they made their final decision to stay. Hence, their cost of living was reduced drastically, as housing is notoriously expensive in London. The three most concerning factors related to housing in London – cost, risk, and stress – were thus virtually removed thanks to the participants' social networks, creating a situation that contributed positively to the decision-making progress. Their carefree mindset and awareness of risk-reduction was very obvious:

*I had friends and first I came for holiday here and then I decided to stay longer because I had a job and... I didn't have nothing to do in Poland because I finished my school. So I just decided to stay longer here and I can always go. (Adrianna)*

*Yes, I came for holidays to my friend. Because she invited me just to see how it is. Then I was like, okay I will stay one month longer maybe. Then I stayed like two years now. (Ala.)*

*I had a friend here in England we spoke and it was like, okay why not? If not you can go back to Poland! (Maja)*

The absence of borders plays a role as well: The abolishment of the border controls with the accession of Poland to the EU provided an attractive opportunity to earn

more money within a short span of time and without any administrative troubles. Unquestionably, the free movement of workers that came into force in 1992 with the introduction of the SEM offered for some EU countries more beneficial prospects than for other EU member states. As shown in the previous chapters, after the EU accession of Poland, the country's migration rate rose excessively, while labour mobility levels were rather indifferent for other EU countries (e.g. France and Germany). Staying in the UK appeared to the participants to be a good and uncomplicated opportunity to generate some extra cash money. Commonly, Polish workers primarily came for a temporary period only, with the purpose of earning money and subsequently returning back to their home countries. The accumulation and provision in the destination country of the several advantageous factors discussed in these sections caused a radical change in the participants' minds, leading the participants to alter their plans from a limited stay to an unlimited stay. The progress chain of the participants becoming Polish labour migrants can be characterized as follows: The decision-making process can be classified as less risky and uncomplicated. It was non-costly (i.e. entailed no unforeseen costs), as they had come 'for holidays' and the possibility to return was always available and emotionally, personally, and financially almost free. The decision can be described as quite riskless or nearly risk-free, as the migrants had the opportunity to find a new job easily should they return home. The entire sample size was employed in the low-skilled sector where they could find jobs easily. Some even had multiple jobs. The decision can also be classified as uncomplicated, as it was a (mostly) unplanned, spontaneous trip and did not involve deeper reflection. Geographical proximity was not a crucial factor, but somewhat important. The accumulation of these multiple givens during the decision-making process and during the migration process led to one deduction: it was indeed desirable to stay and go from being a 'holiday visitor' to being a 'labour migrant'.

Based on the answers from the interviews, one could argue that the Polish workers in general were convinced that they would have stayed in Poland had they been earning more money. Assessing the sequences of answers critically, in relation to the development of the argument, indicates that the participants' replies are not only plausible, but also logically consistent and make full sense. They are free from any inconsistency and within the fit of a logical line: The essential causal relationship of



‘more income–migration’ and ‘not more income–no migration’ is confirmed. If the answer were ‘no’, namely migrating despite the fact that they earn more or at least the same amount of income in their home country, their behaviour would not comply with the rules of the neoclassical theory.

The following strategy was applied in the interviews in order to learn more about participants’ feelings, tendencies and intentions regarding their future plans related to income. The migrants were confronted with a possible scenario, namely that Poland might be fully converged in the future, meaning income levels may get closer to the average income level of the EU. The answers were solely assumptions and based on expectations. The answers to the first question were not unanimous. Having gone through the experience of migrating, the Polish workers were now able to make better predictions about their sensitivity to return migration. The opinions were manifold. Two broad categorizations emerged which describe the participants’ thoughts on return migration. Those who had come alone (or with a partner) and who had established a family or life over the years did not consider returning back. In contrast, younger migrants who had come only recently were more prone to consider migrating to somewhere else or even back to their home country. Conclusively, one can assume that return migration therefore depends on the length of the stay in the destination country and personal background. The longer a migrant has spent in the receiving country, the lower the probability that the migrant will return.

In this section, the neoclassical theory of migration and the applicability of its determinants have been discussed in light of the Polish labour migrant participants’ responses. The main focus was on the income variable. According to the data analysis of the interviews, Polish labour migrants primarily move in ‘search for a better life’. Hereby, the composition of multiple factors, mainly economic-related, and their interaction during the migration process have lead to the decision to migrate. The migrants reported looking ahead and a desire to ensure financial security for their future, which seemed impossible in their home country. The core motivation, and the linchpin at the centre of all interacting factors, was to earn higher income. Therefore, the interview data fully complies with the fundamental paradigm of the neoclassical theory, namely that income is the main motivator, even if the migration process began with spontaneously planned holidays. The driver behind

large migration streams is based on economic determinants. This finding confirms the hypothesis that economic stimulants to migrate are quite strong.

### **4.3 Patterns of employment of Polish labour migrants: Labour market determinants and characteristics**

This section scrutinizes the interaction of further factors related to economic determinants, focusing this time on the nature of the labour market. This section will review the results from the interviews on how labour markets contribute to migration between converged and non-converged regions. The discussion again takes place in the context of the patterns of Polish labour migrants in the UK. In what sectors are Polish migrants employed and why? The section also analyses why skilled labour would move in order to accept low-skilled jobs.

The first chapter introduced the extended version of the neoclassical theory of migration, the Harris-Todaro (H-T) model, which contemplates the variable ‘unemployment’ next to ‘income’ and ‘wage differentials’. The H-T model was originally developed in order to explain rural-to-urban migration amidst unemployment (Harris and Todaro, 1969), but some of its elements may be helpful in the analysis of this section. For example, according to the H-T model, the costs of the probability of being unemployed when migrating are still important, because these costs may influence the decision-making process. Within the context of this research, it is of interest to know to what extent Polish labour migrants calculated risks and how the migrants overcame those risks. Migrants frequently calculate and evaluate the risks associated with migration before they move (Sjaastad, 1968). One of the potential risks is unemployment or a lengthy period to find a job, which results in additional costs.

Risk assessment, as outlined in the first chapter, is an important component of migration (theory) and may help to contribute to a better understanding of the employment pattern of Polish labour migrants.

#### **4.3.1 Employment patterns of Polish labour migrants**

The migrants were asked what kind of difficulties they encountered when entering the labour market, or whether they had any difficulties in finding a job. In the

participation group, none of the migrants referred to any kind of troubles or difficulties. On the contrary, the overall reply was that it had been very easy for them to find a job and access the job market in the UK.

Agnia came to work in her brother's shop in 2012. At the time, she spoke very little English. Before taking the decision to come to the UK to work, she was already confident that she would have a job in the UK; basically, there was almost no probability that she would end up unemployed. When asked in the interview whether she had any difficulties in finding a job after her arrival to the UK, she laughed and replied, 'Ahh no because it is my brother's shop, so.' However, Ania was the only participant in the group who already knew where she would work. Therefore, in her case, any cost that could have accrued from a period of unemployment, as the H-T model argues (Todaro, 1976), was eliminated beforehand.

Overall, the majority of the other participants came without a job lined up, but nonetheless easily found a job. Milosz confirmed that he 'started to work immediately' and 'it wasn't difficult to find a job.' Amelia and Martyna confirmed the same, stating the following:

*It was actually very easy for me to find this job here ( . . . ) I was quite lucky. I've met this through stranger people. (Amelia)*

*I didn't have a problem. I was just walking from door to door ( . . . ) and I was asking for a job. (Martyna)*

Nearly 85% out of the total sample affirmed that they had been highly confident about their ability to find a job. Besides, the reason to migrate originated not from unemployment, as all of the migrants interviewed had already employed before they arrived to the EU, sometimes even in two jobs at the same time. Unemployment as a push factor to move was hence excluded. So why were the labour migrants so confident that they would find a job immediately? In the migration story of Poles to the UK after enlargement, the attractiveness was not only one-sided: the labour markets may indeed have provided a pull factor as well, and are accordingly discussed in the following sub-section.

#### 4.3.2 Characteristics of the labour markets as determinants

The dual labour market theory, as one of the major migration theories, can be reflected on the Polish migrants. Based on the results from the primary data, the easy accessibility to the UK labour market might be a sign for the high demand for the type of Polish migrants in the country. Getting jobs under relatively easy conditions also contributed to the migrants' decision to stay. Most of the time, interviewees were not necessarily aware of their high probability in finding a job.

*Yeah, firstly I didn't think that I would work, really, I just wanted to save some money, and visit London. But after I have changed my mind. (Hania)*

When asked, 'Do you think it is difficult to find a job in London?', the response from one participant working in the catering service was, 'Once you get around, you sort of know, I don't think that it's too difficult. There is a difference in what you are looking for. This kind of job is not so difficult to get' (Dawid).

The reason why Polish labour migrants have little uncertainty about finding a job became obvious when asking more about their employment background. The Polish labour migrants were certain from the beginning about their sector of employment in the UK. They invariably chose the third sector, as they were sure that finding a job in the low-skilled sector was almost guaranteed, as these jobs were easily accessible and did not require high qualifications. The labour market in the UK is experiencing scarcity in unskilled labour (e.g. Anderson et al., 2006), e.g. because the native population refuses to fill the low-skilled jobs, as accordingly to the dual labour market theory. Thanks to the easy access to the jobs in the low skilled sector, especially in restaurants, cafés, and similar establishments, concerns about long periods of unemployment in the destination were eliminated (the H-T extended model).

This finding fits well with the dual-labour market theory outlined in the theories chapter (Chapter 2): the character of the economy in advanced countries creates a demand for low-skilled jobs, which domestic workers refuse to take up due to, for example, status.

There is a primary sector providing well-paid jobs and a secondary sector offering unskilled jobs, e.g. manufacturing. Lower pay makes the secondary sector unattractive to native workers. Migrants are more motivated to work in these low-status jobs because they do not consider themselves as part of the destination society. The fact that they do not consider themselves as part of the destination country was underlined in the interviews by many migrants' expression that they feel excluded from certain jobs, mainly white-collar jobs, due to language deficits.

Although the majority of Polish migrants can be categorized as 'skilled' and possess university backgrounds, they revealed in the interviews how they were already employed in the low-skilled sector in their origin country before their arrival to the UK. Milena, for example, finished her degree in Communication Science, but she stated that she could not find appropriate employment in her field in Poland. Rather than being unemployed, she chose to work in simple jobs in the UK.

*Q: Would you say that it is difficult to find a job in Poland?*

*A: Yeah. Yes it's difficult. I tried it. I found a place to work in a café as a waitress. I was paid but for me it was not enough. Because I pay a rent, I have to pay ticket, I paid for food and ( . . . )I have nothing in my pocket! (Milena)*

Milena was not the only individual in the sample size who ended up working below their qualification skills. The other migrants in the sample group shared the same situation. In fact, all of the interviewees in the Polish sample had university backgrounds. Barbara, who earned a university degree back in her home country, but who works in the catering service, explains as following why she did not make further effort to look for a job that matches with her qualifications:

*Q: You mentioned that you have a university degree. Usually, with a university degree, you could work in an office job. Is it difficult in London for you? Or have you ever tried?*

*A: I have never tried, I've never tried, you know when I came here I worked in catering, and it just stayed like that. Before I did not have the time to look*

*for anything else because I was working long hours in here, so, always like ten hours and I didn't have time or feel like to look for another job. (Basia)*

Furthermore, all of the participants were asked what kind of jobs they had held before they came to the UK. Either the participants had come to the UK straight away after their studies, or they had accepted other low-skilled jobs even though they had studied. In contrast, this specific pattern is not observable in the case of the other two case study countries, Germany and Portugal. Ultimately, the Polish labour migrants exhibited a high propensity to work in the low-skilled sector. Their major concern was to earn money and to start to work as soon as possible. Once they had earned a certain amount and their personal minimum desires had been met, they ceased thinking about looking for more suitable professions that would be in accordance with their educational background. Underemployment thus is imported. Drinkwater (2013) underlines in his study how information was often reported back to families and friends in the home country, which mean that the potential labour migrants were informed about the possibilities to find work in the destination country.

Working in low-skilled jobs was rather predetermined. The Polish labour migrants knew beforehand where to look for jobs, namely in the low-skilled sector, despite their high educational attainments. However, by accepting low-skilled jobs, they were able to reach their aim of earning higher income and enjoying 'a better life', as they often emphasized, and they were able to circumvent the problem of unemployment while seeking higher level jobs, which are generally more difficult to get. Their confidence in finding a job in that particular sector explains the reason for their carefree mindset towards finding employment. This was, at least, the perspective of the migrants, and the perspective of the migrants may rely on or be influenced by the perceived labour market in the receiving country. Not only is the Polish labour migrant pushed into the third sector, the composition of the labour market proves to be attractive to non-UK workers (e.g. Poles and low-skilled migrants) as well, thus constituting a pull-factor. For instance, one key finding reported in studies over the past few years is that two thirds of employers in agriculture and food processing and 40% in hospitality have suggested that UK workers are difficult to recruit because the work is physically demanding and 'not

glamorous’ (Anderson et al., 2006; McCollum and Findlay, 2011; Migration Advisory Committee, 2014; Rogaly, 2006). Other studies have come to similar conclusions regarding the employment structures of labour migrants in the UK, namely that the native population refuses to take up some specific types of works for class reasons, as postulated in the dual-labour market theory.

#### 4.3.3 Implications of language for the Polish migrants

A further variable, which was frequently mentioned, was ‘language’. The following section will portray the function and relevance of the factor language.

##### *4.3.3.1 Language as a determinant in the labour market*

Both of the facts noted above, namely that entering the low-skilled sector was easy and that the migrants’ previous jobs had also been in the low-skilled sector, contributed significantly to the phenomenon of over-qualification of Polish migrant workers. In addition to these observations, there is another interesting reason why the participants explicitly chose the third sector in particular: poor language skills. When they were asked why they had not sought an office job, one of the reasons for most participants was language deficit.

*Q: And is it for you difficult to get an office job here?*

*A: I didn’t try.*

*Q: Why did you not try?*

*A: I don’t know. I thought that maybe my English is not so good to do it. When I’m speaking with someone for example from Poland or something we can understand each other. But when I speak with English or British people it’s really difficult. It’s quite difficult. (Amelia)*

The participants were keenly aware of their language skills. Some of them could imagine working in an office job, but felt their weak English skills would limit their capability. As Carolina put it, ‘I have problem with my language’. Concerning the language skills, the majority of the participants had good conversational English skills and could express themselves easily. Undoubtedly they must have advanced

their language skills immensely since their point of arrival. From the interviews, though, it was clear that the participants still felt insecure about their language skills. Frequently, they expressed their lack of confidence whenever they were talking about other job opportunities, i.e. jobs in the skilled sector. The interviewees rated their language skills as insufficient, thus classifying themselves as incapable of holding jobs in the qualified sector that would align with their educational background. This finding does not comply with the results from other studies (e.g. Drinkwater, 2013) that classify the language skills of Polish labour migrants as ‘intermediate’ or ‘good’. As a result of their insecurities regarding English, the participants did not even try to seek employment outside the third sector. Though the language deficit did not constitute the main reason for this job search focus, it was a factor of influence.

Kataryna, who came to the UK in 2012, was well aware that even in the low-skilled sector she would be able to take up only a few specific jobs due to language deficits, namely those jobs that would not involve direct communication with customers.

*Q: And was it easy to find?*

*A: Ehmm, yes, I think so because it took me two weeks. Because I walked around, first I was looking at shops with clothes and shoes, restaurants, but my English was not good, not good enough to speak to customers. And I passed in Hampstead McDonalds, and I said okay McDonalds, I'll ask about the job. I went there, I spoke to the manager and he said okay we need one person. And I was like woaaaaw I'm happy! Okay! I left my CV and few days later the manager sent me an email about another meeting with me. And he said okay, you have the job. (Milena)*

Consequently, employment opportunities are limited for newly arrived Polish workers. Performing any services related to engagement with customers was considered virtually impossible. However, being aware of their deficit concerning their language skills, the participants were engaged in improving their English: ‘Now for me it's important, English, English, English... now I'm working in McDonald’ (Milena).



#### *4.3.3.2 Language as a determinant in choosing the destination country/labour market*

Another special characteristic of language is its functionality as a determinant when migrants are choosing their destination country. The interviews revealed how language skills can be highly influential in the decision-making process.

The participants stated that English was a compulsory class in their educational system, whereas German was optional. Almost none (1 out of 25) of the participants had any German language skills. When asked why they did not choose another country to move to, the participants reported language as one of the major reasons. Nearly all of them said that because they spoke at least 'some' English, they had chosen England.

Although they were not very fluent initially, at least they knew that they would learn it and they were confident that they would overcome the language problem.

*Q: And why did you come to London and not to Germany or to other European countries?*

*A: Yeah, but because of the language. I know English.*

*(Marysia)*

*Q: You could also go to France, but you came to England.*

*A: Yes, but also if you want to go to Germany you have to speak German. Definitely. I feel more comfortable. English is still a problem, but you can learn it. It's easier.*

*(Cezar)*

*Q: You could have gone to Germany. But you did not go there.*

*A: I didn't go because before I've studied English language. That's why most of the people came.*

*(Aneta)*

The participants had felt, at the very least, that they would be able to overcome the language problem and learn English, whereas German seemed to be ‘very difficult’ (Milosz) or ‘they do not like the German language’ (Maja). Basically, when migrants have a choice to migrate, they migrate to places where language problems will be easier to overcome. That is maybe why more people moved to England after the enlargement than to Germany, even though Germany may have been geographically closer. The personal background or profile of the migrants seemed to be of a lesser concern. It did not matter what kind of qualifications the migrant had achieved. What mattered was their ability to speak the local language.

Language factors seem to play a pivotal role in the migration processes, especially when it comes to the determination of the destination country, even more so than geographic characteristics. Germany is geographically much closer to Poland. The fact that more people decided to migrate to the UK undermines any argument stipulating that migration is defined by geographic proximity. It is unknown how many people would have migrated to Germany instead of the UK if Germany had opened its borders as well right from the beginning for Polish citizens. Nevertheless, the factor of language does seem to be a contributor to the UK’s exceptional popularity as a destination.

#### **4.4 The significance of network theory for Polish labour migrants**

Generally migration concepts try to identify the determinants behind the motivations of migrants. As opposed to other theories, network theory considers migration as a dynamic act that results out of social networks in between spaces. Hence the theory explains what ‘perpetuates’ migration in time and space (Massey et al., 1993). By focusing primarily on social relationships, the deterministic view or the perspective of atomized rational actors is abandoned, thus network theory functions within a different kind of systematic framework. In brief, network theory is conceivable as a ‘self-perpetuation’ of migration streams. This argument, as well as the role of networks, is examined in this section in the content of the decision-making process of Polish labour migrants. Within the framework of this research study, network theory is used to allow a better comprehension of the migration patterns of the Polish labour migrants. Networks seem to be very important as well.

#### 4.4.1 Facilitator of migration: The positive effect of social networks

In the interviews, social networks and their role in the receiving country were of particular interest. As described in the previous section, according to network theory, social networks are not categorized as direct determinants behind the motivation of the migrant; rather networks serve as facilitators of migration. However, the interviewees stated that they probably would not have come if they had not known anyone at all. Almost all of them knew someone before they came, or they were in contact during the migration process. In the majority of the cases, with a few exceptions, if the Polish labour migrants did not have family or friends, they stated they most probably would not have come to the UK. Having friends and family members in the UK contributed significantly to their decision-making process to come to London. Of all the Polish migrants interviewed, a clear majority had a social tie in the UK, and also the majority stated that they came in part because they could rely on their friends' help. In fact, most of them claimed it was conditional for them to know someone in order to depart on a journey to another EU member state. When asked whether they would still have come if they had not had any social ties, nearly all of the respondents said no.

Reflecting on the theories of migration, network was treated not as a determinant to move. In the interviews, they never provided 'networks' as a determinant to move in their decision-making process when they were asked about their motivation. Rather, wages and higher income was the general main reason to migrate. Hence, networks may be a facilitator to move, however the ultimate factor which influences their decision-making process may be the wage determinant. Also, sometimes, it was just about knowing 'someone', and not necessarily always a close friend or relative, which is a tie that can be found generally quite easily. Portes (1989) defines social capital as

the capacity of individuals to command scarce resources by virtue of their membership in networks or broader social structures. Such resources may include economic tangibles like price discounts and interest-free loans, or intangibles like information about business conditions, employment tips, and generalized 'goodwill' in market transactions. (Portes, 1989)

The role of social capital can be considered as highly important, but social capital cannot be justified as a determinant. In particular, accessible advice on employment opportunities and intangibles like sources of information were highly important for the migrants. Housing played a vital role as well. Most of the migrants' migrations were utterly spontaneous and unplanned. Their initial intention was to stay in London for a limited period. In fact, for most of them the only plan was to accumulate additional income and return thereafter. Therefore knowing someone in the destination country in advance and having the ability to stay at their place at the early stages of their journey created a convenient opportunity to eliminate the additional expenses or living costs.

To provide an example from the interviews, Barbara used her social capital and resources from her existing personal network of people to overcome housing and employment issues. When asked whether it was easy to find a job, she replied as follows:

*Yeah, it wasn't very difficult. As I say, you know we are close to the Polish community so when we came we rent the room from a Polish girl you know its always like that someone knows someone who knows someone, so it wasn't very difficult. (Barbara)*

Next to housing, the act of finding employment was also heavily connected to the use of the social network. Nearly all the interviewees confirmed that they found their jobs through the help of friends or people they knew. Their friends' help served as guidance. The transfer of information hence functioned as a reassurance for the labour migrants.

Milosz, corroborated the existing difficulties of not having a social network:

*Yeah it was...was hard. If you don't have anyone here there is no guide. Tell you what to do, where to go. It's quite hard. . . . The other Polish people, most of them had friends or family here, which made everything a lot easier for them. Yes, they just go there, stay with them, so they didn't worry about accommodation, with the food, don't have to be looking for job... but I had no one. I just came, stand there on Victoria Station and just was wondering what to do next. (Milosz)*

With social capital, the costs and risks associated with the act of migrating are reduced, i.e. housing, employment, and social interaction. Social capital thus has a direct effect on the migration process. The probability of migrating is increased, and the selection of the destination country is facilitated.

Furthermore, although in the first few months of their arrival the migrants used their networks as a starting point, afterwards the migrants started to become independent. Sonia explained that, though her friend was a great help in the beginning, Sonia later ‘started to be independent’; after she ‘start[ed] to work’ and ‘go to English school as well’, Sonia left her friend’s place. Martyna described a similar experience.

In most of the cases, having a family functioned as a determinant for choosing the new destination country. The participants’ destination country was practically almost determined on the basis of geographic location of their social network. Hence their networks served as a determinant of *where* to move. Maja, for instance, did consider the option to go to Germany. However, as she explains, ‘but then my friends called me in London. Because it was just a spontaneous decision. I just finished my school I did my exams and then I came here straight away.’ Similarly, Milena toyed with the idea of migrating to Germany, but ultimately elected the UK as well: ‘I didn’t know no one there, at this moment. So I didn’t go. But if I will know someone, yeah I will go, because they pay good!’

#### 4.4.2 Same identity network eases life through network community and group psychology

The networks not only facilitated the actual movement of Polish labour migrants to a specific country but also generated a community feeling that contributed to the comfort and fast adaptation of the migrants. This community feeling eliminates the feeling of alienation in a new home country. The knowledge of the existence of diaspora eases feelings of anxiety or loneliness and therefore increases the tendency to migrate. In some of the cases, the community was an important factor that contributed to the participants’ decision to stay permanently in the UK. Most of them naturally felt connected to their fellow countrymen. This may have alleviated homesickness or even substituted the community feeling they had in their home countries. As Basia assessed, ‘You always try to stay close to your community, and

especially when you have kids, you want them to learn their own language and to learn everything in Polish.’

Sonia, who came alone and stayed thanks to an invitation from a close friend to live at her place in the beginning, explained happily how comfortable she feels in London: ‘It’s very interesting because like you know, many cultures and religious live in one place, and they don’t argue. Everything is together. There is harmony. A lot of Polish people live in Dalston, Hendon, Islington.’ The concentration of groups from the same nationalities or ethnicities in the same area is common in many migration countries. Before the act of migration, it is very likely or even presumed that the individual migrant possesses a substantial amount of information or knowledge about the geographical location as well as about other further information about his peers in the recipient country. The information is obtained via the circle of personal social networks in the origin country or, as is common nowadays, through the means of media. Thus, generally, before moving migrants become acquainted with the existing concentrations of their peers in the receiving countries. With the high accessibility and the dispersion of excessive information thanks to online media, potential migrants are well informed about both the opportunities and the risks of migration, and they take these into consideration before moving.

The abundant availability of information, however, may not represent the only channel to stimulate migration. Generally, the composition of a migrants’ social circle tends to feature acquaintances or friends who have also experienced migration or are in some ways related to migration. Labour migration (unlike forced migration or other forms of migration) can be defined as a ‘positive’ form of migration as, fundamentally, people are going to other countries to work in order to ‘improve’ or ‘add value’ to their lives, whether in terms of financial or personal gains. Within a social circle, the perception of migration as a positive act may create a highly influential factor amongst social groups. The results can be interpreted as a type of ‘herd mentality’ behaviour. For instance, the interviewees subconsciously mentioned that, before they had migrated themselves, ‘most of the people go to another country to work’ or that another ‘friend went to Australia’ (Adrianna) or that ‘friends had come to England’ (Sonia). No direct questions were asked to determine whether the participants had been influenced by external factors such as the influence of the

existence of peer migrants. However, through the indirect and unconscious linkages to other peer migrants, it was understandable that peer pressure to migrate was existent to some extent.

If the aforementioned condition to migrate – i.e. ‘having a social network’ – was not applicable, then the option of ‘coming with someone’ provided a further channel that facilitated migration.

When the migrants were asked whether they still would have come if they had not known anyone, or if they would have come alone, their answers were again very straightforward:

*Ehh no... don't think so. Probably I would be carrying on studying and do the master. (Ewelina)*

The presence of a community in the destination country, specifically a community of people who had underwent the same experience, had provided a secure foundation for the potential migrants.

#### **4.5 The negligence of the social determinants of Polish labour migrants**

The main objective thus far in this chapter has been to focus on the economic determinants and on the role of networks that led to migration and to explore the different factors and interrelations of various contexts within the act of migration. The fundamental aim was to find out or to scrutinize through the semi-structured interviews whether and how economic determinants lead to more mobility among Polish migrants. In order to confirm the expectations of the hypotheses of this research, the interviewees had to confirm that...

- ‘economic’ factors were the paramount reason to migrate;
- the migrants would not have come if they had earned the same level of income in their origin countries;
- the migrants would take up any job independent of skill levels as long as they earned more compared to the income levels in their origin countries.

So far, the determinants have been concentrated around economic activity related variables. The next section addresses the social related variables and their importance.

#### 4.5.1 The role of social determinants for Polish labour migrants working in the low-skilled sector in London

The fact that the migrant workers never referred to any social variables in relation to their migration can lead to the first assumption that those variables were simply irrelevant. The migrants were then asked directly whether social factors, such as the attraction of the city, social activities, or social status or even prestige, played a role during the decision-making process. The responses were clear and unanimous: the majority shared the opinion that ‘it was not important at all’ (e.g. Martyna, Ania). A few common explanations were that ‘it has become normal’ to go abroad. Basically, according to the opinion of the Polish labour migrants, moving to another EU country to work did not contribute to their social status or prestige at all. Or at least, the migrants did not consider these determinants as valuable or as important. Basia explains as follows:

*Q: Do you think you will profit from prestige or social status when you work here in London and then go back? Or does it not make a big difference in your Polish environment?*

*A: Not really now anymore. Maybe before, like when we came here. Like eight years ago, ten years ago. Yeah then it was something like oh my god... are you in London, I wish to go there. Now it's like, so many Polish people are here. They probably have someone from their family, in England, Scotland or in Germany. So it is like normal now when you're living in the UK. (Basia)*

Regarding the development of personal skills, Polish labour migrants considered English language skills as important. Although most of the participants did not excel in terms of English language skills, they were able to express themselves on a fluent basis and could lead conversations without big difficulties. They were perfectly aware that sound English skills were essential to become part of the society they



were living in, and they perceived those skills as an important factor in relation to their work:

*Without English you cannot do a lot, when I want to work in another job, I need to speak better English. Like, it is okay to talk in English with Polish people, but not with the English. They speak different English. (Carolina)*

The Polish migrants showed a strong interest in improving their language skills<sup>50</sup>, but doing so was never cited as a reason why they came. Rather, they perceived it as a duty in order to become part of the society. The Germans, in contrast, often came in order to excel in their English language skills and to become more competitive in the professional world. This was never the case for the Polish labour migrants. In short, though both groups regarded improvement of English skills as an increase of human capital, the groups had different underlying motivations or reasons.

Furthermore, some of the participants considered their stay in London as a ‘privilege’, which can be linked to the ideas of prestige or social status. In fact, London was perceived as a ‘door opener’ to the rest of the world (Milosz). Or, for some, the UK (in this case London) presented the better alternative to every other possibility they had at that moment in their lives.

*So I met people from everywhere, literally from everywhere, because it was nice, so I was like, if I can study here, its always better to study in London, the paper from the Uni that you study here is always better than the one from Poland. (Marte)*

*I wanted to see the world and travelling. From London, you have an opportunity to go everywhere; you have more connection to go everywhere. From my country I could not even whole year save the money to somewhere once a year. (Ewelina)*

Nevertheless, the advantages of London were generally not stated as a reason to come. Only two participants began the interviews by emphasizing the advantages of

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<sup>50</sup> In fact, most of them they enrolled into language courses, or wanted to continue their language studies. Since they have the flexibility at work, most (e.g. Kataryna and Katrin) were able to attend courses in the evenings.

cosmopolitan cities such as London and did not state income as a main reason. However, both of the interviewees (Ewelina and Mateusz) also stated that they were regarding their stay in London as ‘journey’ or as an ‘adventure’.

The factor of networking, which presents another social variable as it is an investment in human capital too, was not addressed by the Polish participants at all. Lifestyle reasons were mentioned in the interviews, but they were not a priority as they were for the Germans. In conclusion, social reasons seemed of less importance for the Polish labour migrants. Although the participants spoke of leisure activities, their first motivation was to meet their basic demands via financial gains.

#### **4.6 Barriers and labour mobility levels in the EU**

This last section focuses on barriers to moving. The first chapter outlined how, regarding European labour mobility, in recent decades the debates have revolved around the argument that mobility levels are low due to barriers. The most prominent barrier, as put forward by the literature, is the language barrier. A plethora of recent studies on mobility levels in Europe have argued that the fundamental cause behind low mobility levels is language deficiency, which allegedly hinders potential labour migrants from moving. It may be useful to ask how this particular ‘problem’ can be overcome, or whether it is a surmountable problem at all.

##### **4.6.1 Approaches of Polish labour migrants towards the conception of ‘language’ as a barrier**

In order to investigate the validity of language being an inhibitor to move, the researcher asked the participants to explain their decision to move and that decision’s linkage to languages in detail. The variable ‘language’ was thereby tested to determine whether it acted as an inhibitor or not. The results were remarkable: contrary to the main argument from existing literature, all the workers migrated despite huge language deficits. Firstly, language was not considered as a barrier, or at least it was not considered as an insurmountable problem. As Ania stated with a laugh, ‘It is a problem but I have my teacher . . . and I try to learn.’

The participants did acknowledge language deficiency among Polish workers as a hindrance or problem, but not when related to migrating to the UK. Rather, as

discussed in the previous sections, it was considered a hindrance for entering the white-collar job market. Possessing only low English skills, the participants basically resigned themselves to accepting any kind of job:

*I was looking for work everywhere! I was going from one place to another place and you know, learned the words, looking for a job, going everywhere asking the same sentence, then I found kitchen porter for ten hours. (Milosz)*

In fact, the migrants did not consider their language challenges as a problem at all in terms of choosing to migrate, as long as they had the right motivations. That means, their interest in moving was stronger than the contemplation of language deficits. Again, it may be related to the fact that most of them work in the third sector, where low English skills may be regarded as sufficient. Also, they were quite confident that they would gradually improve their language skills. As Mateusz noted, ‘I don’t speak like them, but I want to be close to. It takes me time.’

Ada described her difficulties and her determination to overcome her anxiety in terms of language as follows:

*I was so scared to open my mouth. It was a big issue in my mind before I came. I refused to speak in the beginning for over a couple of months. But then, I thought that, if that Chinese girl can speak English as well, then I can learn it, too! And after one year or two, it was not a problem anymore. (Ada)*

Regarding the Polish labour migrants, although the majority had language-related issues, such as lack of confidence, they still chose to migrate to another EU country. As a conclusion, for the Polish sample, which constitutes a ‘highly mobile’ group of migrants, language was not really considered as a barrier even though anxieties existed. The participants were quite aware of their language deficits, as outlined in the previous sections, and they had invested in their language skills as soon as they had arrived. This furthermore shows their willingness to overcome the language problem. In essence, it can be argued that the migrants’ motivation to earn money overcame the deficit in language skills. Based on the interviews, those who had the underlying motivations to move (originating from economic motivations) considered language problems as no hindrance or at most a surmountable problem.

This section of the study has challenged the common argument in the literature on mobility levels, namely that mobility levels are low due to language barriers. The results are interesting in that, although the Polish sample size was affected very highly by high rates of language deficiency, Poland is one of the EU countries with the highest rate of migration of workers. In contrast, German workers generally have advanced language skill levels, but they are more reluctant to move. Those with low language skills are in fact ‘more mobile’ if you compare the two groups from this study.

#### **4.7 Summary and conclusion**

The chapter has explored the compliance of the neoclassical theory of migration with the responses of the Polish labour migrant participants who came to London in order to work. The aim of this chapter was to investigate and to reveal the interrelations of various factors and circumstances that motivated the Polish labour migrants to move. The difference to existing studies lies in the use of methodologies. Whereas a large body of studies (Brueckner et al. 2009, Sprenger, 2013; Kahanec and Zimmermann, 2008) mainly employed statistical devices and relied on large data sets, this study used semi-structured, face-to-face interviews on a personal basis, which provided a more detailed analysis and deeper understanding behind the motivations and the harmonization of the variables that induced migration, thus providing a distinctive approach. One big advantage of interviews is the possibility to interfere whenever required or to scrutinize irregularities or new, unanticipated findings. Overall, the findings confirm the results from the preceding studies (e.g. Sprenger, 2013) and the hypothesis of this research, namely that labour migration can be explained on the basis of the neoclassical theory of migration, with ‘higher income’ being the main motivational source. At least, the findings confirm the hypothesis for the sample group in this chapter. In addition, however, the interviews led to some new discoveries: For example, ‘the search for a better life’ was an aspiration fundamentally desired by the Polish workers. The income levels hereby may define what ‘a better life is’, but based on the analysis from the interviews, the process seems to be more complex, including further aspects such as long working hours, promotion prospects at work, and work–life balance. Essentially, economic advantages are not the only stimulus, or they are too simplistic to explain the

phenomenon of high migration rates of Polish workers. Instead, the motivational background revolves around a multidimensional layer. Conclusively, although income was the primary reason, 'income' referred not exactly and solely to 'higher income levels'. Rather, 'income' incorporated the consequences of the income levels which had motivated the workers to move. Furthermore, the Polish labour migrants had determined beforehand that they would seek and accept employment in the low-skilled sector. This observation hints that the over-qualification problem of skilled workers is rooted in the sending country and cannot necessarily be attributed to a problem in the developed economies. Lastly, social networks seemed to be more significant than anticipated. According to the literature, network theory explains how migration perpetuates. However, most of the participants stated that it was almost crucial to know someone beforehand.

## Chapter 5 German labour migrants in London

### 5.1 Introduction

This chapter evaluates the most important determinants regarding labour migration from Germany. Figure 3 -1 in Chapter 4) provided a detailed illustration about the preconditions to confirm the postulation that migration is a phenomenon that occurs in significant sizes only between regions with economic disparities. The first case study exposed how the Polish sample came to London in order to profit from improved income. The present chapter analyses the opposite scenario by looking at labour migration between regions with similar standards of economic levels. The aim of this chapter is to uncover what causes low levels of mobility within these regions by looking at the motivations of labour migrants. This chapter seeks to find out what drives people to move between converged regions, and it examines what types of motivators are missing in comparison to the Polish sample.

In order to address the research question, this study conducted 21 semi-structured interviews with skilled as well as unskilled labour migrants from Germany from different employment sectors who had come to London to work. The results from the semi-structured interviews are presented in the subsequent paragraphs, and are structured according to the density of the variables as well as their relevance.

### 5.2 Why German citizens migrate to the UK: Tracing the motivations of Germans working in London

As per the research framework, the interview opened with the question, ‘Why did you come to the UK?’ The very first intuitive answers of the Germans were much more concrete than those of their Polish counterparts. Nearly the entire sample proposed the following striking and very straightforward answer:

*To work. (Christine)*

*In order to work here. (Ruben)*

Their instinctive intention behind their arrival to London was stated in a very succinct and precise way. Considering the fact that the target group of this study was

comprised entirely of labour migrants / professionals, one might regard the formulation ‘Why did you come to the UK *to work*?’ as more appropriate, instead of ‘Why did you come to England?’ However, migrants do not always necessarily come with the idea of being a ‘labourer’<sup>51</sup> in the first place. Recent studies on international migration have exposed how under certain circumstances, migrants enter the country as ‘transition migrants’ (e.g. refugees) and unintentionally turn into ‘labour migrants’, thereby contributing to a significant change in the composition of the national labour force (Içduygu, 2011). Theoretically, this chain of thought can be applied to the first case study group, i.e. the Poles, too. The interviews with the Polish workers in this study have revealed how their principal motivation to move was based on the notion to ‘have a life’, which in turn was achieved via the means of ‘working’. Henceforth, labour migrants may not always directly be equalized with the ‘mobile workers’. On the surface, both terms may appear merely as a ‘mobile labour force’, but further scrutiny of their motivations reveal their disguise and show how their incentives to move were rooted in more complex reasons. This rationale is not overly controversial, as within the logic of the neoclassical theory of migration, through the act of moving, an increased income will most probably entail improvements regarding the general well being and most probably positively affect the social life of the individual. Therefore, the open-ended type of formulation (i.e. *Why did you come to the UK* instead of *Why did you come to work*?) in the introductory question is considered as more pragmatic.

The aim of the interviews for the German professionals was similar to that of the interviews for the Polish group of participants: to capture the most intuitive and most vital drives behind their motivation to move. Among the Poles the most frequent answer was ‘to have a life’, which could be attained through the channel ‘higher income’. ‘To have a life’ was basically the ultimate desire of the Polish migrants, and working was the necessary vehicle to achieve it. The very primary intuitive reply from the Germans, in contrast, was ‘I came to work’, as opposed to ‘I came to have a life’. This initial finding with the subtle variation indicates that there is an essential distinction between the two motivations. The two expressions give the impression of reflecting the same idea, but yet provide a large spectrum for variances in terms of

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<sup>51</sup> Professionals, in this case.

interpretation. As one of the aims of this research is to capture the most fundamental motivation to move, this subtle distinction seems highly important. The delicate but simultaneously highly significant difference between both articulations can be interpreted as following: whereas the Poles had to come to London to work in order to benefit from an improved standard of living (via increased income), the Germans did not necessarily come in order to benefit from an improvement in their lives. In fact, the Poles desperately needed to improve their social lives, whereas the Germans rather simply wanted to have a 'change' in their lifestyle. The former need can be described as an essential requirement for a decent life, whereas the latter want is a choice. The feeling of urgency is absent from the German migrants' motivation. For the German labour migrants, changing their workplace was an optional choice, one which did contribute to a change in their lifestyle, but did not essentially bring substantial improvements in terms of standard of living. It is at this point where the nexus of common motivators deviate and where the dissimilarity of the motivation of each group originates. For the Poles, moving to work was a means to achieve a greater standard of living where higher income was an absolute necessity; for the Germans, moving to work did not bring higher income and thus was rather a choice of lifestyle. A positive change can be regarded, to some extent, as an improvement too. Nonetheless, the two forms of improvements of the two groups are far from each other.

The bottom line is that the underlying differentiation between the motivations of the two groups exhibits following rationale: groups from different regions of the EU migrate to work for different reasons, either seeking for an improved standard of life through income, or seeking a positive change in their life via changing workplace where income is irrelevant. The contrast is between an improved life and a positive lifestyle change. Both motivations result in different mobility levels.

#### 5.2.1 Active and passive labour migrants

Among the German participants, two types of migration groups emerged: active and passive labour migrants. The first type of workers, the passive movers, consisted of individuals who had arrived to the UK as a result of merely taking advantage of offers or opportunities that they had happened to come across incidentally. The migrants from this specific group were not actively seeking a job in another EU



country. Rather, their movement to the UK was the result of the following process chain: realizing, considering, and subsequently accepting an opportunity that had arisen incidentally.

*The main reason for me was the job. I had been working for the same company already in Germany. After 6 months I was offered the job in London. I consequently decided to come here in order to work, to gather some work experience abroad and in order to improve my CV ( . . . ) I knew a few people already from the company before I came. To be honest, I would personally never have sent a CV, if I had not been offered the job. (Timur)*

*Before coming to the UK I was employed in Germany also at the (Deutsche) Bank in the department for commerce of certificates. I also sent applications for jobs in Germany. While I was still there, it happened that four people resigned from their current jobs and left job openings. This means they were looking for people. Among others, also Juniors. So I handed my application directly over to colleagues who were already working for the bank, and this is how I got the position. (Jörg)*

Quite often, the German migrants' change of workplace and residence to the UK resulted out of a conventional job application process, where applications were being sent to any suitable open positions in England and in Germany. The UK was not the only option. Or, sometimes, the participants had simply been 'offered' a job opportunity; the opportunity thus did not arise from self-initiative. They subsequently moved to the location of their new job. Besides, the 'passive seekers', as they are labelled in this research, often were open to any type of positions in line with their qualifications in almost any destination country. In theory, there were open to work in Germany, too. Therefore, one can argue that the passive job seekers never felt a strong desire to move to the UK. A very common behavioural approach of the passive movers was that they were not desperately seeking to move for a job; they simply 'made use of' existing opportunities without any self-commitment or self-initiative. The participants did not become active by themselves; rather, they were 'mobilized' by an opportunity that they had not elicited. This observation was not applicable to all of the participants, but it was true for half of the number of participants. In addition, once they were offered a position, the participants still went

through the stages of the decision-making process and thus exhibit motivators to move. However, it should be kept in mind that the decision-making process was initiated only once the participants had realized potential opportunities.

Furthermore, for some of the participants, specifically for those in the lower age-range, the general perception was that they felt relatively indifferent about continuing their lives in Germany. Their attitude was somewhat neutral about where they would work. They did not have a strong desire or urge to leave the country, but were propelled to migrate because they were ‘seeking for something new’, for a different city, as they were ‘bored’ with their current city (Alissa), or because they wanted to gain ‘international experience’ or ‘work experience abroad’ (Alissa). Some had already been abroad before London (e.g. Andreas and Franziska), and once they came back they realized that they were unhappy. Franja lamented, ‘Then my visa was expired. When I came back to Germany I realized that I do not fit in there anymore.’

The remaining counter-group, which comprises around two thirds of the interviewees, can be described as a group with more enthused attributes towards the idea of working in another EU country. Hence they are classified as ‘active seekers’. The underlying difference is their motivational approach towards moving abroad. The group of active seekers was driven by an explicit and specific urge or drive to work in another EU country. They exhibited common motivators, which can be summarized as ‘the search for a different lifestyle’ or ‘career aspirations’. This type of labour migrant can be characterized as a ‘firmly determined to move’ type of labour migrant. During the interviews, they commonly referred to key phrases such as ‘attraction of the city’, ‘work experience abroad’, or ‘skills improvement’ as reasons behind their motivations to go abroad to work. These reasons are depicted and analysed in detail in the subsequent section.

### **5.3 Determinants to move of German employers in the UK**

The principal answer to the introductory question (i.e. ‘Why did you come to the UK?’) among the sample of German workers in London often comprised the short and precise formulation ‘in order to work’, as described above. In most cases, the participant then continued by telling the story behind their decision to move to

London. A noteworthy observation is that the answers of the German participants were quite often succinct, pragmatic, and brief in comparison to those of the Polish participants, and the researcher therefore quite often asked the participant whether he or she could elaborate more. Once the interviews were completed, the researcher produced a chart with the help of Nvivo and identified the most important variables that led to the decision to move among the German participants. The determinants were predominantly socially related variables. The most frequent answer for why they came to London was because they felt ‘attracted’ to the city. The following sections will portray the most important variables behind the migration of the German sample size.

### 5.3.1 Attraction of the city

*Because London is simply very interesting. The people here are interesting. And because I think the city is simply great. (Christine)*

*Well, on one hand, the prospects for a permanent job, on the other hand also the city, which I quite like. (Simon)*

*I wanted to live in a cosmopolitan city. (Arnold)*

Within the literature of migration, the attraction of migrants to big cities is not a new theme. For example, Henderson (1986, 1988) discussed a strong positive correlation between the city and the skill composition of the workforce, with skilled labour being drawn out of smaller cities. The reason primarily results from the demand side, as higher skills are required as production rises with the increase of the city size. Secondly, from the supply side, educated people are attracted to large cities because of amenities and services, as noted under the so-called ‘bright lights’ hypothesis. London hereby provides an excellent destination for migration as it meets the criteria perfectly well for being an attractive city. Because of its large size, it offers a wide range of employment opportunities. London is one of the largest cities worldwide and thus is home to a multitude of international companies. On top of that, London is also one of the most important financial hubs. For someone working in the financial sector, London undoubtedly can be described as a mecca in the heart of Europe.

*I have been here before thanks to an internship and I fell in love with this city. So I wanted to go back to London very much. Because I also think that London offers quite a lot as a financial centre. There are so many possibilities here. Also it is the core of Europe and the city has a lot to offer.*  
(Benjamin)

Without a doubt, on a global scale London is one of the most attractive cosmopolitan cities worldwide for a multitude of reasons. Precisely out of this reason, this research suggests that London is a suitable archetype to investigate migrant workers from other EU countries. A further explanation why the city of London was picked, and not another UK city, is based on the fact that considering that Germans hardly move in general, it is more useful to look at those regions in the UK where their population is statistically the highest.

Other than employment opportunities, London provides a wide range of social activities, which also contributes to its attractiveness. As for what interested the German participants, one of the central findings was that the availability of the social activities was a highly significant determinant to move and played a crucial role during their decision-making process. In the interviews, the participants often made statements referring to attributes such as ‘more to do’, ‘the city has a lot to offer’, or ‘never boring’, to mention only a few examples. As the data gathered is not quantifiable, it is difficult to assess which factors dominate. Still, the perception that emerged during the interviews was that, compared to the variable ‘employment opportunities’, the longing for social activities seemed to play a bigger role when moving. The major finding of this research is that the reason why someone from Germany moves to London to work is because he or she wants to have a ‘change in their lives’ without necessarily earning more income or even seeing change in any other economic activity. Although working was stated as the principal answer, the underlying rationale was that the participants wanted to ‘change’ their lives, and were essentially seeking for something ‘new’. They had a desire, an aspiration, too, just as the Polish participants did. Both groups were seeking for an achievement, where ‘working’ was merely a means to achieve the purpose. The Polish workers wanted to benefit from a better standard of living (having more free time), whereas the Germans simply wanted to have a ‘change’ in their lifestyle. The main difference

between the groups is that whereas the Poles required more income to achieve their goals, the Germans wanted to achieve their aspiration through moving to a different work location. This move also often enabled higher income, but the income lacked the meaningful function it had in the context of the Polish participants. The following section demonstrates how income was even absolutely irrelevant when it came to migration among the Germans.

The motivations attraction of the city or desire for new life experience / adventures are supported by the literature on the determinants of German immigrants. The study by SVR (2015) looked at the motivations of Germans immigrants of a particular size across all professions and skill levels. The study measured the frequency of answers when asking respondents about their motivation, and the most frequent answer was ‘to make new experience’ and to extend their cultural horizon. Certainly, cosmopolitan cities such as London offer opportunities to satisfy such needs. Regarding the study of the SVR, the participants could provide multiple answers, and the frequency of the answers determined their importance. In contrast, in the present study, the participants’ very first answer counted as the most important one. Surely, emigration is not a monocausal process with only one determinant behind it, but in this study it was important to identify and examine the ‘major’ reason.

### 5.3.2 Skill development and career opportunities

As mentioned earlier, London being an ‘attraction’ as a destination city was among the most frequent preliminary answers, but it was not the only determinant. The other determinants consisted mostly of variables which can be related to ‘improvement’ or development of the personal profile, e.g. through the acquisition of various skills. These variables included language skills, career opportunities, networking or other soft skills, and can be considered as an investment in the personal human capital. The findings resemble and confirm the findings of the SVR, where the second most frequent answer was ‘for professional reasons’, followed by partner or family obligations. Income was only the fourth most frequent answer.

*I have been working in Mannheim in the SAP Arena, since right after my A levels. I was responsible for the VIP areas. In Mannheim in the realm of event management, I had achieved the highest, which was possible to*

*achieve. That is why I knew that I could not achieve anything more in terms of career in Mannheim. The only possibilities left were to apply for bigger event management positions such as in Berlin or in Hamburg. However, my English skills were too bad for that. Then I thought that, alright, if I go to England now, improve my English skills, after a few years when I am back to Germany I will come back with great qualifications. (Alissa)*

*At first sight wage played not a big role at all. Because the primary concern was 'the experience with soft skills. . . . Work-life balance is important. But work is important too since career was for me on the foreground in order to come here. That's why on one hand I want to achieve my career goals, on the other hand I would like to enjoy London as much as possible. Networking was very important for me too, definitely. (Timur).*

*International work experience. (Rosi)*

In addition to the determinants obtained in the responses to the opening question, the continuation of the interview uncovered a broad range of further variables that had a direct effect on the decision-making process to migrate to London. The determinants display one common characteristic: each of them ought to contribute to their 'personal profile' in a positive way. That means that the participants' motivations were based on the idea of enriching their own human capital. All of the German labour migrants basically shared this one universal trait of character when it came to their motivations to move. This peculiar trait of the German labour migrants can be explained against the backdrop of globalization, wherein the professional world is becoming more and more competitive. Nowadays, professionals often excel on the basis of their work experience and their professional skills. The density of their accumulated skills hereby establishes an essential criterion to succeed in their career. Based on the data from the interviews, the types of skills that were revealed included language skills, but also skills at work, communication skills, international work experience, and even range of network. That being said, one might argue that most of the skills in theory could be acquired in the home country, too. An individual does not necessarily need to travel abroad to develop personal skills. Hence, the acquisition of skills cannot count as the only motivator to move abroad to work. The desired skills must have been considered as available in combination with other

types of variables during the participants' decision-making process. It is also notable that although these variables were referred to very frequently, they were never put forward as the 'primary' reasons. Hence, among migrant groups who make up a 'less mobile' type of labour force, such as the German group, examining the variables in an intertwined framework is important due to the variables' richness in complexity. One reason alone is mostly not the only (obvious) factor. As it happened, the case was the same for the Polish group.

### 5.3.3 Further variable pairs and groups, e.g. work–life balance / more free time

Another determinant that was a push factor to migrate was the lack of time available in Germany. Similar to the Polish sample, some of the interviewees complained about the insufficiency of leisure time during their previous jobs and thus decided to come to London to work. Andreas explicitly recalled thinking, 'Okay, I have been working too much in Germany' and then realizing 'I wanted to have more free time'.

In both of the interview groups, lack of free time, as a result of working overtime, can be observed as one of the major reasons to migrate. Yet there was an underlying difference. Whereas the Polish group was suffering from lack of free time as a constraint due to their necessary long hours or employment in multiple jobs due to insufficient income, the German group was lacking free time as they were choosing to do overtime purely for career reasons. Both groups thus exhibited fundamentally different reasons behind the non-availability of time for social activities. Essentially, one group was dependent on higher income in order to have more free time, whereas the other group was not.

In theory, Andreas could have circumvented the problem of working too many hours by finding a different job in his own home country, too, instead of migrating to the UK. Moving abroad thus undeniably did not provide the only solution to the problem of 'lack of time'. Additional factors must have had an influence on the decision-making process to move, too. In the interview, Andreas noted further factors such as 'working in an English speaking environment' and the non-requirement of a visa. Andreas had been abroad before in order to work, which speaks for his 'mobile personality' and openness to moving. Again, like the desire 'to develop new skills', lack of free time or work–life imbalance does not constitute the only stand-alone

reason to migrate. Rather, this determinant is another of the multiple joint determinants that the German group revealed as a cause to move.

#### **5.4 The function of the factor ‘language’**

Language as a skill qualification, as well as a means of communication, is a non-ignorable criterion among the determinants to move. Currently, there are 23 officially recognized languages in the EU. This section attempts to find answers to the following questions: For the German migrants, to what extent was language an important factor when moving abroad to work, i.e. to London? In addition, in what way did the individuals perceive language as an impediment to moving? In particular, the first sub-research question aimed to scrutinize how the German labour migrants dealt with ‘language deficits’ and to what extent those deficits were perceived as barriers to moving, as it is often argued that language is one of the main reasons behind the low mobility levels (e.g. Zimmermann, 2008; EU Commission, 2012).

The initial observations indicate that most of the Germans came because they wanted to work in an English-speaking environment. Language, instead of being a barrier, may be regarded as a pull-factor. The German professionals repeatedly reported how they were offered a job directly from recruiters or internal contacts thanks to their German language skills. The next section questions the role of language when moving.

First and foremost, based on their own evaluations, none of the participants possessed impeccable English skills (although most of them had held high-skilled jobs). Before moving to the UK, the interviewees were perfectly well aware about their unsatisfactory English language skills. Some of the migrants even stated that they had feared that their limited fluency would make it difficult to get a job in an English-speaking country. Nevertheless, their perception about lacking language skills did not seem to constitute a barrier to migrate (otherwise they would not be in London now). Despite their awareness and worries about their communication skills, they still chose to migrate. None of the labours indicated that their language deficits ever composed a serious concern regarding their decision to move or not to move. Nor did they ever consider it as a potential reason not to migrate.



*In the office, we are all German speakers. Still I do notice that it is not too easy. We frequently make phone calls with English companies. So it was quite difficult for me in the beginning on the phone. Generally on a daily basis it is ok. (Christine)*

*I did not really have a problem with the language. I would not say that my English is particularly good. I have a very strong German accent. But well I can make it through and can communicate. (Ruben).*

*I do not really have any problems concerning language. Once in a while there is this word which I do not know, but this is quite normal. . . . Language turned out not to be too big of a problem. When I was new, surely it was a bit more difficult. But now it is ok. . . . I had doubts in the beginning concerning the language. But when I arrived here, especially here in London, I had noticed that not many people speak perfect English. That was encouraging for me to speak more. (Timur)*

Moreover, the German labour migrants stated how their communication skills improved immensely after a short while, and so was now considered as a surmountable hindrance. In sum, language certainly does not constitute a barrier for those migrants who are determined and truly willing to move. Conclusively, it can be argued that if an individual has a strong willingness to come, the individual will choose to migrate despite lower levels of communication skills.

When asked why their primary choice was to migrate to the UK instead of to another EU country, the participants responded that their knowledge of the English language was the main reason.

*Because I do not speak any other European language (Ruben)*

*I don't speak French. Because of the language. (Louise)*

Similar to the Polish group, the German group viewed language basically as a determinant for choosing the country. Upon the question 'Why England?', the respondents did not make any further referrals other than 'language', thus excluding other factors. Language therefore qualifies as the 'only' factor as a determinant for

the destination country. This finding could justifiably inspire the following enquiries: If the participants from the sample group spoke French, would they have moved to France instead? And on a wider scale, if Germans spoke French, would that generate higher levels of migrants moving to France from Germany, and thus increased mobility levels within the EU? Based on the interviews, language itself alone was never a direct determinant to move, as knowing the language itself alone was never stated as a ‘reason’ or motivation to move. There is always another variable present that provides the rest of the incentive necessary to make the individual move. Interestingly, the migrant participants in this study possessed different degrees of English levels, from very low skills of English (Polish sample size) to relatively proficient English command (German group), and all of the migrants decided to come independent of their language skills. In addition, labour migrants who possess lower English skills – such as the Polish labour migrants – exhibit larger sizes of migration streams. And those who migrate in small numbers, they never considered it as a problem. In brief, based on the findings from the data, language seems not a problem if the right motivations exist, even if the language skills are low.

## **5.5 Examining economic determinants of migration between converged regions**

The following sections will present the findings about economic determinants in the German sample size.

### **5.5.1 The non-compliance of the German migrants (i.e. of converged regions) with the neoclassical theory**

As set out in the previous sections, one hypothesis of this thesis stipulates that the determinant of individuals to move from less converged regions derives mainly from economic motivation. This postulation tested positively on the Polish workers. It was proven on the basis of the semi-structured interviews that Polish workers move in the first place in order to earn higher income. This section addresses the role of economic determinants and their interaction within the decision-making process of German labour migrants. The objective of this section is to scrutinize whether the reverse causal relationship of the hypothesis – namely the non-application of economic variables as motivators among labour migrants between converged areas within Europe – is applicable. Because, as shown, economic factors are the cause

behind the movement of people between converging regions, then as a causal relationship, between regionally converged economies, the incentives to move are expected to be based on non-economic determinants, as income levels are similar in those regions. As there is less variation of income levels between converged regions, income as a motivator is supposed to play a less significant role when migrating. Exactly this relationship will be analysed in this chapter.

To begin with, a crucial observation is the fact that no economic variables were mentioned in response to the introductory question ‘Why did you come to the UK?’. The primary evaluations of the interviews within the German sample revealed how, regarding their arrival to London, economic determinants as motivators were completely lacking. In fact, they were never mentioned in the course of the whole interview at any time. None of the participants ever referred to any economic, i.e. income-related, motivators when explaining why they came to the UK to work. Instead, as outlined above, the main motivations originated from social reasons. The negligence of the economic determinants of the labour migrants leads to the presumption that these determinants were simply insignificant when the Germans were deciding to move to work abroad. In order to substantiate the assumption that any economic motivation is disregarded, the researcher asked the participants explicitly and directly about the importance of income in relation to their decision-making process. The answers were generally as follows: ‘No, I did not come for the sake of higher income. I believe that in Germany I would be earning more’ (Timur).

The straightforward statement that they did not come in order to earn more income explicitly confirms the non-applicability of the neoclassical theory of migration among German labour migrants, or in a broader sense, among labour migrants between converged regions.

The researcher asked the entire sample about income as a variable, and each of the participants could assured the researcher either that income was not a relevant factor at all, or that it played only a tertiary or maybe secondary role. Evidently there was unanimous consent that economic motivations were not among their reasons to work abroad. On the basis of the findings from the primary data of this study, this further underlines the hypothesis that between converged regions, economic migration is less existent.

The German migrants additionally explained that their current wages were even lower in their destination country, i.e. the UK. Over half of the participants stated that they were, or would be, earning higher levels of income in Germany. Surprisingly however, they had happily given up the idea of benefitting from higher levels of income and turned to other alternatives where socially related interests were prevailing. German professionals prefer to focus on other preferences in life, such as the availability of more free time, international (work) experience, the development of personal skills, and an improved work–life balance. This finding suggests that German migrants value non-materialistic capital. As Arnold representatively noted with satisfaction, ‘I earn less now. But I have more free time instead.’

The German participants generally rated their own income levels in the UK as ‘not high’. In fact, their perception was that their wages were under their expectations. In a more detailed conversation, they explained how they were unsatisfied with what they were earning and stated that income levels in their country of migration could be a lot better. This reverse condition – where earnings were lower in the migration country – was applicable to more than half of the German participants.

*Q: Are you happy with your wage? Do you think that you are paid accordingly to your qualification?*

*A: At the moment, no. I have earned more in Germany. There was more available. But here I have more quality of life.*

*Q: And this is important for you?*

*A: Right.*

*Q: So you did not come to earn more money?*

*A: Nope.*

*Q: What about the social status and prestige?*

*A: If I go back to Germany, it will be surely easier for me to find a job.*

*(Arnold)*

*I work in a small company. I have to admit that my salary is not too high. It is about just enough. It could be more, definitely.*

*(Franja)*

Despite the lower income in their new jobs in the UK, the participants refrained from complaints. Presumably, this contradictory attitude was related to the fact that in theory, more availability of income would not necessarily have made any significant change to their lifestyle. They were already at the upper level of income levels and above the average, so they were already enjoying a certain minimum of living standard.

*Q: Wages were not significant?*

*A: Let's say it like this, I know that I can find something good in this professional area. That is why the entry salary is not really important for me.*

*(Jörg)*

*Q: Was salary important for you?*

*A: In the first moment not at all. I first wanted to have a job, as London is important. But the wages for me are ok since I work in a bank.*

*(Christine)*

Accordingly to the demographic profiles, sharing the same educational background, both of the cohorts (German and Polish) can be classified as 'skilled' labour. Still, strikingly, each of the sample sizes is employed in different sectors and belongs to different income categories. Being part of the lower income level, Polish labour migrants are inherently compelled to economically motivated migration. German labour migrants, in contrast, are in the upper income levels already and do not feel the same economic strain. It is noteworthy to mention that the aim of this thesis is not to draw a comparison between the two countries. Rather the intention is to ask 'why' levels of labour migration differ regionally. Hence, sharing the same educational profile or similar skill level, but being employed in two different sectors, provides a very good basis for examining migrants' variances in motivations to

migrate. One of the most valuable findings from the interviews so far is the observation that both groups were ultimately seeking a change in lifestyle or in terms of personal improvement, whether through the development of skills or by enjoying an improved social life, and where money was the essential vehicle to achieve that change for one group, namely the Poles, this was much less so the case for the Germans. As the Germans already belonged to a group with higher income levels, they did not feel the necessity to move further up on the income bar to achieve an ‘improved lifestyle via materialistic improvement’. In other words, they were not obliged to earn necessarily more income in order to have an ‘improved life’, as was the case with the Polish labour migrants. Indeed, the improvement of skills can be regarded as an economic related activity, too. In the future, this particular acquisition may lead to higher income as well. However, the German participants did not give the impression that they had migrated because they wanted to ‘invest’ in their future, as they hardly talked about it. Rather, seeking social pleasure was the prevailing variable. Future investment in the German groups seemed less important than it had been in the Polish group.

According to the results from the interviews, unlike the Poles, the primary concern of the Germans is not to earn more money but to satisfy their interest in non-materialistic gains, such as experiencing new cultures or a different lifestyle. These are the variables, which define the mobility levels of migrants between two economically converged regions with similar standards of livings.

## **5.6 Tracing the employment patterns of German migrants in the UK employment market**

Regarding employment of the Germans in the labour market, a striking insight was that German workers seem to make up a highly popular labour force in the British employment market based on their own narratives. This section explores recruitment as well as employment patterns and any peculiarities regarding German workers, specifically German professionals in London.

The dual-labour market theory, as portrayed in Chapter 1, explains how specific features of the labour markets can create pull factors for migrants. According to the dual-labour market theory, the segmentation of the employment market as a result of

wage differences leads to a higher demand of unskilled workers from abroad. The observations from the interviews lead to the assumption that regarding the German migrant workers, the UK employment market constitutes to some extent a pull factor, too. The role of the UK employment market as a pull factor is supported by the fact that the entire group of participants from the interviews was employed exclusively in jobs that required them to speak German. This section traces and unfolds this particular pattern of employment or characteristics of the employment market in London and demonstrates why it can be perceived as a pull factor.

First of all, the entire sample group was working in jobs where German language skills were essential. This pattern of employment was not a coincidence. In fact, all of the interviewees had been offered their jobs in part as the position required a fluent German speaker. Without this very specific requirement, these German speakers would have found gaining access to the job market to be considerably more challenging.

*Q: Was it easy to find a job?*

*A: It was not too difficult. I had sent away a few applications and found a job very soon after. In a German-speaking company. We are selling to German companies. I found that quite quickly.*

*(Fred)*

*It is a really good job. I speak German and English. And also sometimes Spanish. The colleagues are very nice, too.*

*(Christine)*

*I work in a company which mediates interns. . . . In the office, everyone is German speaking. I believe that is why I got the job so easily.*

*(Alissa)*

Thanks to their fluency in German, the German professionals were granted easy access to jobs. If these positions were not existent, the migrants would have had to

compete for jobs with local job seekers, which would have made finding a job much more difficult. This competition, however, was eliminated.

Moreover, the migrants' specific distinctiveness – being a fluent German speaker – made them more demandable, at least for some specific jobs. London, as a cosmopolitan city, is home to various multinational companies, financial institutions, and headquarters of numerous international companies where many different languages are represented. To scrutinize further, no German professionals were employed in jobs in which only English was spoken.

The access to the jobs was provided through the use of various channels: the German professionals mostly attained their jobs either through the use of social capital (i.e. information or social networks from their former workplace in Germany) or through recruiters. Though sometimes they had gone through an active job application process, this was very seldom.

*I contacted a recruiter/recruitment agency. (Rosi)*

*I in fact received a telephone call from the headhunter. She must have found my CV somewhere. I had also applied for other jobs, but not at the bank. (Christine)*

*It was relatively easy to find a job. I had two interviews and it was done. Through internet. (Ruben)*

*For IT people it is easy to get a job. The only thing you have to do is to upload your CV on a recruitment page in the internet, to wait for the recruiter to call you. (Arnold)*

Some of them were fairly confident from the beginning that they would not encounter any troubles in finding a job. Others, on the other hand, were not sure in the beginning, but then were surprised at how they got a new job in London so quickly. Caroline noted her own surprise at the speed of the process: 'I resigned from my previous job, came here and after three weeks I had a job.'

It is also noteworthy to mention that Germans in general enjoy a positive reputation and thus are highly sought after in the UK labour market. As Arnold observed about



job searching, ‘if you are German, this makes everything a lot easier’. Germans’ popularity can be explained on the basis of various characteristics, such as having a pedantic work attitude or high reliability. These factors may also contribute to why they are hired easily, forming a further pull factor. Moreover, it is also notable that the lack of skilled labour is a current issue on a global scale; the resulting demand for skilled labour may have further eased the Germans’ process of finding a job in London.

### 5.7 The non-compliance of the network theory

In the chapter about Polish labour migrants (Chapter 4), networks played a crucial role when migrating. This theory of migration describes networks as social links between friends or family members who reside in the destination country. Within the process of migration, their presence is used as a ‘source to get support’ in various forms, such as in relation to housing, obtaining information, or mediating between contacts. Fundamentally, networks serve to alleviate the process of migration. Concerning the labour migrants from the Polish sample group, the majority of the interviewees had assessed that, in theory, their arrival to the UK would have been significantly more difficult without their networks. This section will scrutinize the role of networks among German labour workers. To what extent are they important? How are they used, if ever? Surprisingly, the interviews have revealed that networks are completely insignificant among German labour migrants. Evidence of this assessment is presented in this section.

In order to assess the availability of as well as the German migrants’ relationship to their social networks, the participants were asked whether they had known anyone before they came to the UK. No interviewees had known anyone or had any social ties with anyone in London before they came.

*Q: Did you know anyone before you came?*

*A: No, I did not know anyone.*

*(Franja)*

*Q: Did you know any people here?*

A: No.

(Veronika)

All of the replies from the group of participant were almost equal. None of the participants reported having a contact person before their arrival, let alone someone they knew personally. The answers were slightly unexpected, as London is home to a substantial German community and, in terms of geographical proximity, Germany is very close to England, even closer than Poland.

The stark differences in terms of population size of Germans and Poles in London or in the UK in general may not provide an equal base for comparison. Still, the scrutiny of networks is significant, as this thesis is interested in the 'use of the networks' for each individual case study. The findings of the use of social networks regarding Germans may be summarized and interpreted as follows: First and foremost, German workers, representing a sample of migrants from a converged region, do not rely on networks when moving, unlike their Polish counterparts. As explained by network theory, networks perpetuate and alleviate migration via the dissemination of information. This means for the German group of workers that they did not need to rely on, obtain, or use any of the social capital (such as housing, information, or personal contacts) in the receiving country. The absence of a social network did not make any difference to the moving process of the Germans. As a result, German labour migrants moved independently of social networks. The Polish group, on the contrary, was somewhat heavily dependent on their network, e.g. via relying on friends and contacts' help, especially in their initial period after arrival.

A more detailed evaluation of the data provides more insight behind the indifferent attitude of the Germans towards social networks. For example, the following quotations demonstrate the Germans who came to London to work were confident that they would meet and expand their social network relatively quickly.

*I live in a shared flat. It was therefore easy to connect to the people. And also I started to work very soon.*

(Rosi)

*Q: Was this convincing for you to move, knowing these few people? How significant were they?*

*A: Well yes it is quite nice to know someone from the beginning, but you mainly work together with German colleagues, that's why.*

*(Jörg)*

As opposed to their Polish counterparts, the Germans were confident that they would meet new people very soon through their jobs and establish a social network. They believed that in particular their workplace would serve as the major environment through which they would make new friends and connections. Their confidence minimized their inclination to rely on help from other networks. Possibly, their confidence may be explained on the basis of their sufficiency in terms of material capital, which made them feel secure, as they were not depending on higher income as much as the Polish migrants were. Knowing or not knowing anyone beforehand thus seemed irrelevant, as the German migrants materialistically felt more independent. On the basis of the findings, one can therefore stipulate that the Germans had an entirely different attitude towards 'social ties' and 'networks' as opposed to the Polish and were less dependent on them.

In summary, Germans are non-related to network theory. This helps to confirm the 'non-migrating' character of Germans, or, from a broader perspective, of people between converged areas. Theoretically, one may argue that Germans are generally non-migrating groups of people, as they do not share the characteristics of the migrants outlined in migration theories. This study, however, postulates that German migrate too, but in lower numbers as their determinants are different from those of the general migration theories.

### **5.8 Future plans: Moving or not**

In addition to the foregoing themes, this research was further interested in the medium-term and long-term plans of the labour migrants. The sample was therefore asked as well about their intentions to move or stay in the future. The research was interested in knowing under what circumstances the migrants would move again. Would they move if they earned higher wages, just as the neoclassical theory of

migration stipulates? This section presents the results from the interviews on this subject.

Some of the participants did not know about their future plans yet, so the answer was simply 'I do not know yet' (e.g. Arnold and Alissa). For the other participants, generally their decision to move or stay was dependent on multiple factors. In respect to their future plans about to move or not to move, following responses were given:

*Q: Would you consider moving again?*

*A: Yes I am relatively open to that. Eventually to do a PhD. It depends on a lot of things, whether I will go somewhere else to work later or not. It depends on the private relationships, it depends on the job.*

*Q: Let's assume that you get a job offer where you will earn more.*

*A: It depends how much more. But it also depends on the time, and for how long I had been where. Because you do build your friends circle. I find it very tiring to change your city again and to start from zero.*

*(Ruben)*

*At the moment I would not move on. I was already earning more in Germany. I could also start to earn more. But leisure time is more important for me.*

*(Arnold)*

*I would not make it only dependent on the money. If the option suits me, if the career suits my profile, then I would eventually consider it.*

*(Timur)*

*Q: If you received a job offer where you earn more in Germany, would you then go back?*

*A: Yes, if the life standard in Germany is higher. That means I should earn at least the same or more there. But this also depends on the position, whether it will be again as interesting as this one.*

(Jörg)

*Depends why you go or where you go. If it was a super cool company, for instance, then I would consider it, but this also depends on the commission that I will get and what kind of company.*

(Simon)

Evidently, this time there is no one straightforward and comprehensive answer. The answers to the question in relation to their intentions to move or not to move were very multifaceted. Some of the points which were discernable are the following: participants' decision on moving or not was not especially dependent on financial factors, as no participant ever mentioned that they would exclusively move for the sake of a higher income. (Remember that within the Polish group, this was sometimes the case.) Rather, when asked whether wages played a role in moving, the Germans explained that their decision was based on the interaction of multiple factors, namely on the coupling of numerous social variables. The single component 'earning more' did not qualify as a determinant to move. For some, the nature of the job was important. Would the new job be 'interesting', or would the individual be able to develop new skills through accepting a new job in a new place?

It is noteworthy to mention that return migration rates are relatively high among Germans. The study conducted by the SVR (2015) found that as many migrants as immigrants move back again after a couple of years. Migrants' main motivation to move back is different from their main motivation to migrate away: German migrants return home for family and friends. Secondly, the SVR (2015) study reported that their German participants frequently referenced employment opportunities. Whether employment opportunities constitute a plausible answer is doubtful though, as in theory, Germans could switch to other job opportunities anywhere (unless the country or world is affected by high unemployment levels or crisis).

Taking into account all of the above, regarding the motivations of German labour migrants, there is no uniform rule for why they move. This finding is opposed to the migration patterns of the Poles, whose major motivation behind their migration was straightforward and singular. The reasons why Germans came to London are

multifaceted. Perhaps the most important differentiation is that money played no significant role for the Germans when moving. Their motivational reasons were grounded on social variables only. The same applies for their future intentions. In the long run, the standard of life seemed to become more important when deciding whether to move or not to move.

## 5.9 Conclusion

This chapter examined the motivations of German labour migrants residing in London. The objective was to identify the dominating determinants of migration as well as their relevance. One of the major discoveries was that, unlike the case with the Polish sample, there was no single dominant determinant why the German sample had migrated. Regarding the German labour migrants, their motivations were grounded on a variety of reasons.

A further crucial finding in this research was that Germans move exclusively for social reasons. The identified determinants all consisted of social variables. In contrast, in the Polish group, motivations were driven mainly by economic aspirations.

The first section of the chapter scrutinized the difference of the prevalent response to the opening question ‘Why did you come to the UK?’. ‘To have a life’ was the main response among the Polish group, but ‘I came to work’ was the German group’s primary answer. The interpretational analyses gave way to the understanding that Poles come in order to improve their lives through the benefits of higher income. Thanks to increased earnings, they will be able to work fewer hours and thereby enjoy an improvement in their social life. Basically, their social life is attained via the means of income. In comparison, the Germans were not reliant on higher income to attain an improved standard of life. Instead, they wanted a change in lifestyle, which they sought to find through a change in their jobs (by migrating).

The second section explored German labour migrants’ reasons for moving in more detail. The results from the interviews led to the assumption that the Germans’ movement was not dependent on money at all. Rather, their motivations were related to social variables predominantly and were mostly grounded on the combination of a variety of determinants. Material gain was rather insignificant. Therefore, one of the

findings from the field research was that the ability to earn more money in another country does not lead to higher mobility among Germans. In a broader sense, between the converged regions in the EU, income is irrelevant when moving. The only determinant that generates a high stream of migration within the EU is income, which can satisfy economic motivations.

Moreover, the role of networks was examined among German labour migrants. The results showed how network theory of migration is not applicable to the Germans. The findings conformed to the common logic: as Germans are classified as a non-moving cohort, the non-application of the migration theory is reasonable. To confirm this assessment, the application of network theory was examined at the micro-level. In other words, the use of social networks was scrutinized among a sample group of Germans who are considered as ‘movers’ among a large non-moving cohort. Even these movers did not conform to network theory. This supports that German labour migrants cannot be classified as the ‘typical’ labour migrants who are generally explained through the models of migration.

The findings regarding the factor of language were that, in general, a higher degree of fluency in the specific foreign language leads to more confidence and courage during the decision-making process to move or not to move. Despite their poor language skills, the Polish participants exemplified that language does not matter at all, at least as long as the ‘main’ stimuli to move originates from economic motivations. The results from the German group are similar to those from the Polish group: although the Germans had language deficits, they were still keen to come. Conclusively, one can say that for those who are really interested in migration, language might not always constitute a barrier to move.

In regard to their plans either to move or to stay, intentions were less settled. However, the general opinion was that standard of life was important for the long term. The Germans, i.e. the movers between converged regions, also seemed more open to ‘move on’ or, in other words, they seemed more mobile and also more open to returning back to their families and friends. Rather than long-term migration, circulation of workers might be more appropriate as a characteristic of the sample in this chapter.

In summary, those who moved to the UK to work were not after material gain. The factor of income had no influence on their lifestyle and in particular, it did not limit the amount of available time for leisure activities, which was the case for the Polish migrants. Those who had moved from Germany seemed to have already reached the minimum level of income necessary to guarantee a decent life. The Germans were thus more interested in experiencing different cultures, lifestyles, etc.



## **Chapter 6 Portugal and the crisis: Labour migration during times of divergence**

### **6.1 Introduction**

This chapter traces the motivational background of Portuguese labour migrants working in London. The sample consisted of heterogeneous participants and can be separated based on two sets of contrasting dimensions: firstly, those in the low-skilled sector versus those in the high-skilled sector, and secondly those who came to London before the European Debt Crisis (after 2009) versus those who came after.

The main focus of this chapter is on the financial crisis as well as the Euro debt crisis and its impact on the decision-making process to migrate. The following sections will in particular scrutinize mobility in the EU during periods of crisis and recession, and will discuss labour migration under the contemplation of the Economic and Monetary Union (EMU). The objective of this chapter is to identify the determinants of the decision-making process of the labour migrants affected by the crisis. As labour mobility, according to Mundell (1961), has a regulative function during asymmetric shocks in optimal currency areas, this chapter scrutinizes under what circumstances labour migrants move. The assessment is based on the sample of Portuguese labour migrants, namely on what their main determinants are and how the determinants relate to periods of crisis. The major aim is to expose the crisis in the EMU and its interaction with the movement of workers (labour mobility) and to show how divergence results in increased mobility levels, and not convergence.

### **6.2 Tracing the motivational background of Portuguese labour migrants: ‘Why did you come to the UK?’**

Chapter 4 about the country profiles illustrated how Portugal has experienced recurring crises and thus has exhibited a less stable economy in the EU over the past few decades. This chapter traces the motivations to migrate among Portuguese migrants by examining the stories of Portuguese labour migrants who decided to move to the UK. The results of the interviews indicate that the migrants’ decision to move was heavily influenced by the negative impact of the crisis and the related sense of insecurity and instability, which left them almost with no other choice but to migrate. As were the first two case studies, this case study opened the interviews

with the question ‘Why did you come to the UK?’. The prevalent determinant was very obvious, namely ‘the crisis’ or, as a consequence of the crisis, the loss of a job. This universal answer was applicable to the whole of the sample, independent of whether the migrants were skilled or unskilled or had come before or after the crisis.

*Q: Why did you come to the UK?*

*A: I lost my job. I had some family here. We had the chance to come. Then I said okay let’s go and try for one year. (Patricia)*

Patricia came to London in 2003. At the time of the interview, she was working in the catering service and was very content with her current job as well as her personal life. Before she came to London, she had been a factory worker (tertiary sector) in Lisbon, and she had no strong educational background. Similar to the Polish group migrants, her initial intention was to come for a temporary time only, save money and then return. However, she ended up staying longer, as did most of her peers. Her migration story cannot be related directly to the Eurozone crisis, as she arrived to London prior to 2008, but the reason behind her arrival can be grouped with the same determinant(s) – loss of job or, so to speak, unemployment. Patricia explained that before she moved to London, she had been employed in a few jobs in the low-skilled sector, but even those were difficult to keep up with, and she finally lost her job. Her major concern, that she would not be able to pay her bills one day, became real, and she consequently decided to leave the country.

Like Patricia, Andre decided to migrate to London after losing his job. Upon arriving in London in 2006, Andre found a position as a barista in the catering service; at the time of the interview (all interviews took place in 2014), he was still working as a barista. He, too, came to England before the main crisis, namely the Euro crisis, hit Portugal in 2010. Nonetheless, Andre reported that his country had already been seeing foreshadowing of the issues to come: ‘on that time we had a lot of recession, there was an economic crisis. And our business was not employing staffs . . . and we decided to come to England because here are more options of job.’ Considering the economic indicators in regard to this, Gibson, Palivas and Tavlas (2014) describe in their paper how Portugal experienced a downward fall already after 2001 and how this affected the citizen already long before the crisis intensified after the 2009. As

outlined in chapter four, unemployment rates started to rise after the beginning of 2000s. According to the statistical data on unemployment growth and GDP per capita, Although things got seriously worse for Portugal especially after 2010, where divergence increased more than ever (see chapter four), based on the experience of the interviewees, the worsening situation of the economy was already in the beginning of the 2002 and Portugal's ranking had been falling since 2005<sup>52</sup>, recovering again by 2014.

Similarly to Patricia's migration, though Andres' arrival cannot be linked directly to the Euro crisis in 2010-11 yet, nevertheless, the persisting instability in the economy for the last decades had the same effect on the decision-making process to migrate or not to migrate. The critical economic situation in his home country prior to the Euro crisis was a sufficient reason for Andre to leave his country and the symptoms of the actual crisis in 2010 were perceived already long before.

'Losing my job', the same reason put forward by Patricia, was the main reason why Amadeus came. Based on the observations from the participants, the following process chain led to the outward migration in Portugal before the Euro zone crisis: constant economic instability and imbalances, followed by unemployment or the threat of unemployment. In turn, the Portuguese work force felt insecure and anxious, as they faced a potential lack of income. The determining variable behind their decision to migrate was therefore loss of job and lack of income, which led to anxiety, worry about the future, and feelings of insecurity.

Divergence / Instability → Insecurity → Migration

The other half of the interviewees consisted of participants who came during the period after the crisis. The researcher was interested in finding out what these participants' motivations to migrate were, and to what extent their motivations were related to the crisis. These migrants' feelings, or the variables, were not necessarily different in comparison to those who had come before the Euro crisis.

*Q: Why did you come to the UK, what was the main reason?*

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<sup>52</sup> <https://www.publico.pt/economia/noticia/portugal-desce-dois-lugares-no-ranking-da-competitividade-1604866>

*A: Basically, like I said, I finished my studies, and in Portugal it was already the beginning of the crisis in 2008 and in 2009. So when I finished in 2011 I knew that it would be hard to find a job. So I thought that I have to prepare myself to get out of Portugal. The reason why I came to UK is, at that time I was speaking English, a little bit, I had no clue about German or French. So, this was the only option for me, to come to the UK. (Jose)*

Andre came as a fresh graduate to work in the UK. Back in Portugal, even though he had had finished his university degree, he had worked as a security guard. He explained that he had been satisfied with the income, but he had also been aware that his job was not suitable as a long-term job. Most importantly, the idea of losing his job and facing unemployment had constituted a main and disturbing factor. During the conversation, Jose communicated that he had found himself in a hopeless situation. Comparing to the Polish sample group, the Portuguese group did not refer to income levels. The main motivation revolved around the crisis and unemployment as a cause to move. As Cruz representatively responded when asked why he had migrated, ‘Crisis, just the crisis.’

In a speech on behalf of the EU Commission given in 2014, Andor Laszio, the European Commissioner for Employment, Social Affairs and Inclusion stated that the ‘current level of economic and social divergence within the euro area is without precedent in the entire history of the EMU.’ Accordingly, there was gap between unemployment rates in the northern and southern parts of the Euro Areas already in the 1990s; however, the rates were moving in the same direction, thus converging. He further acknowledges in this speech how a massive, unprecedented divergence came into effect and that the ‘divergence is clear from the unemployment rate for young people and the percentage of young people neither in employment, nor in education or training.’ (EU Commission, 2014)

He further highlights that divergence is very dangerous in the EU. In a recent report from 2014, the EU Commission states happily that labour mobility has slightly risen recently in the EU-12 countries. Considering divergence since the economic crises in the EU, labour mobility may not be the result of the deeper integration of the labour markets but, theoretically, instead the result of the divergence in the Euro Area.

The report Labour Market and Wage developments released by the EU confirms that ‘From migration data based on administrative records it is possible to discern clear patterns of intra-EU mobility, with net flows from crisis-hit countries to better performing Member States’ (EU Commission, 2015) The marked rise in EU citizens working in another EU country reflects increased mobility from crisis to non-crisis countries. Moreover, the report states the following regarding the expected significant effect of the unemployment rate on migration: ‘If the unemployment rate of the destination country increases by 1% relative to the origin country, the bilateral migration flow to this country is estimated to decrease by about 0.14% in the specifications with country effects.’ The same report also gives a statement on the effectiveness of labour mobility as an adjustment mechanism during asymmetric shocks:

Finally, mutual euro area membership does not appear to affect migration by itself, but the estimated interaction terms indicate that it does influence migration flows . . . Mutual euro area membership intensifies migration toward countries with a relatively low unemployment rate, as suggested by the negative and significant estimated coefficient of the interaction term between the EMU. . . . this effect appears to have strengthened further in the crisis. This suggests that migration flows have contributed to the adjustment to asymmetric shocks more in the euro area countries than between other countries. (p. 123)

Looking at the statistics, the UK, which is a member states outside of the Eurozone, is the largest recipient of Portuguese migrants (except for the year 2004, when the EU underwent the enlargement process, Factbook Portugal, 2014). The comparison of GDP per capita levels in chapter four show how the GDP per capita levels of Portugal diverged with those of the UK as well. This research study considers divergence not only as a issue related to the EMU only, but specifies the divergence levels and migration levels between the UK and Portugal.

Cruz and Roberta came as a married couple and with one child from Lisbon to London 2-3 years before the interview took place in 2014. They were both skilled workers. They categorized themselves as the ‘middle class’. The trigger behind their decision to move was very obvious, again the crisis. Cruz and Roberta provided very

detailed answers. To the first question, for example, Cruz, the husband, did not hesitate to explain in detail the manner in which the crisis affected them. The couple's level of detail in their explanation proved that their decision was less spontaneous and more carefully thought-out than the decision of the low-skilled migrants. Their decision to move can be directly linked to economic crisis. They mentioned that they were frightened of losing their jobs even before the crisis: 'Even before, it was already like that. With the crisis, it became even worse. The middle class was really hit by those' (Cruz). After the crisis in 2009, their concerns intensified, and they finally took action 'to move'.

In summary, regarding the introductory question 'What was the main reason why you came?', both of the groups evidently and exclusively migrated thanks to the consequences of the crises, i.e. the loss of their jobs or the threat of losing their jobs, which would unavoidably lead to a 'lack of income', aggravating their lives. Whereas the unskilled sample mostly had already experienced a job loss, the skilled labour migrants mostly just felt insecure, and migration served as a form of 'prevention'. This section has briefly exposed the main reason why Portuguese people migrated. The next section provides a more detailed analysis of the determinants and migration of Portuguese people within Europe.

### **6.3 Behind the impact of the economic crisis: A more detailed examination of the motivations and determinants of Portuguese labour migrants within the framework of economic crisis**

The first section exposed the most prominent intuitive answer to the opening question 'Why did you move to London?'. The whole group of participants in the sample group provided the same, unanimous answer: the crisis. This section provides a broader analysis on the relationship between the economic crisis and the participants' migration by scrutinizing more profoundly the individual variables mentioned during the course of the interviews. The results show how the decision-making process of the Portuguese labour migrants was highly influenced by an intense feeling of 'economic insecurity' and 'lack of trust' in the government (as opposed to the variable 'to have a life' in the Polish case study). The deep mistrust and pessimistic perception of their future lives was coined by the impact of the crisis, which led to high levels of shortages in the labour market. This section analyses the

effects of the instable economy on the Portuguese employers in more detail and within the context of the Eurozone crisis and the unsustainable national economy of Portugal during the last years.

#### 6.3.1 Variables influencing the decision-making process of Portuguese migrants: Job loss and the sense of instability / insecurity

During the Eurozone crisis in 2010, Portugal was one of the countries that suffered the most from the crisis in the EU. The financial crisis entailed a stark decrease in productivity levels, which led to shortages in high numbers regarding work and employment on the European level, particularly in Portugal and in Spain. To illustrate the magnitude of the crisis, in 2010 the number of unemployed in Portugal increased by 40.5%. That represents an increase of approximately 175,000 unemployed, elevating the unemployment rate by 10.9% since the third quarter of 2008, when the American banks and insurance companies began to implode.<sup>53</sup> However, Portugal was hit by high unemployment rates before the era of crisis even began. In the 2 years just before the crisis struck, this tendency sharpened exponentially.<sup>54</sup>

Concerning the national labour markets, the employers did not remain unaffected. The interviews incorporated workers from both sectors – unskilled as well as white-collar workers. The participants in the interviews did not restrain from providing very wide and intensively elaborated answers to the question of the motivation behind their migration. As evident from the interviews, the on-going economic crisis undeniably affected the personal lives of the Portuguese citizen. Most importantly, the persistent threat of being unemployed – entailing lack of income – put a big question mark in their minds about their future lives. The feeling of continuous insecurity, their sceptical attitude towards the political situation and the government, as well as their overtly pessimistic mindset about their future were all ongoing issues discussed and were mentioned in all of the interviews. The portrayal of Andre's situation literally left him no other possibility than contemplating outward migration:

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<sup>53</sup> <http://observatorio-das-desigualdades.cies.iscte.pt/index.jsp?page=projects&id=115>. Accessed 23 March

<sup>54</sup> <http://observatorio-das-desigualdades.cies.iscte.pt/index.jsp?page=projects&id=115>. Accessed 23 March 2015.

*Q: At the point of time when you left Portugal, was it difficult for you to find a job?*

*A: It was, it was. Yes, it still is difficult. . . . Because I was working for a French company. And the salary was late all the time. I had to pay rent. I had my own house over there. I had to pay mortgage. So it was a struggle. That's why, that was the reason. (Andre)*

Unquestionably, the long-term economic instability, followed by the Eurozone crisis, had a huge influence on the lives of the Portuguese people, and often on various dimensions. The unsustainable, but above all, unpredictable future prospects concerning the national labour markets made Amadeus' life enormously difficult as he was constantly confronted with the possibility of having no money at all. At the point when he decided to come, he was still working. However, he experienced steady fear and was anxious about losing his job. The difficulty in foreseeing whether he would be able to pay his rent turned into a psychological concern. Finally, the persistent concerns were reason enough for him to convince himself to migrate somewhere else. In comparison, the main underlying trigger to migrate was not 'low payment' as it was the case within the Polish sample group; rather the insecurity of getting paid constituted the main driver behind his decision to migrate. The questionable reliability of his monthly income rendered it nearly impossible to lead a normal life in his home country.

Jose, who can be classified according to his educational background as a skilled worker, was exposed to the same dilemma as Andre. He fiercely accentuated how the underlying concern was about much more than a 'low' income; rather, the main problem was his ability to 'keep a job' at all:

*The only reason why I'm here is that at least I can keep a job and swap. I can find another job quite easily. Otherwise, I mean, all my family, all my friends, all my everything, all my life is still in Portugal. (Jose)*

Ana, who came to work as a waitress, confirmed the same observation as well:

*Q: Compared to the average wages in the EU, the income level in Portugal is relatively low. That means you came explicitly to earn a higher wage?*



*A: Yes, wages and it is easier to find a job. (Ana)*

Each time, the participants confirmed that though ‘generally low income levels’ was a concern, the ability to keep a job was the prevailing determinant. The Polish migrants, in contrast, never complained about difficulties in accessing jobs. On the contrary, they were sometimes employed in multiple jobs. The variable of ‘low wages’ was never put forward as the main argument by the Portuguese and can therefore be excluded from being a main stimulator to migrate. ‘Low wages’ were mentioned in the interviews sporadically, but most of the time as a result of cuts in wages during the crisis. In fact, some of the participants indicated that they did not perceive any big differences comparing the wages in Portugal (when they were employed) to the wages in the UK, and thus weakened the argument that ‘Portuguese move due to low income levels’. Cruz, for example, explicitly mentioned that his income in Portugal permitted a comfortable lifestyle:

*So we didn't have really like... we were not big spenders in anything. But when someone would invite us to have dinner out, we would go. On one hand we weren't in a situation to see, to check our balances whether we had enough money to do anything we wanted to do, on the other hand we were not spending crazy on it like that, so. (Cruz)*

As evident from Cruz’ story, he and his family were not seriously suffering from deficits of income in Portugal. In fact, no participants in the entire sample group ever mentioned that money was insufficient, as was the case with the Polish group. Rather, their concern originated from the feeling of insecurity and the fear of losing the job, which would then lead to a total lack of income.

Reflecting on the GDP per capita levels, in chapter four, it was explained how Portugal made a progressive growth regarding the standard of living, although it never caught up with the EU average. Portugal was strong enough to qualify to join together with ten other EU countries in launching the EMU, which proves it achievement of an efficient economy. Overall, Portugal has been a member of the EU for a longer period than has Poland, and thus Portugal has undergone economic convergence and adaptation of standards of living to the EU average to a greater extent than has Poland. This may explain why, even though GDP per capita diverged

slightly, the standard of living was still perceived as more tolerable in Portugal than in Poland, where differences in standards of living were the main results behind the participants' movements.

Cruz's further explanation of his family's situation in Portugal only makes the above assessment more convincing:

*If we were in that situation where we were able to save, we would have been stable . . . [and] the other thing is that, what we knew was that if one of us lost their job in Portugal, things would be really difficult immediately. It would just take me losing my job. . . . We weren't in a situation where we had to manage whether we had enough money... But in the end, if we were in the situation where we could save, then we would have settled. (Cruz).*

The participants almost all noted that they would have stayed in their homes if a steady and 'secure' income had been available, independent of ever mentioning or complaining about wages being low. Hence, the feeling of instability was the main contributor to their decision to move. It remains questionable whether they would still have migrated if their perception about their future lives had been more positive. It is interesting that the Portuguese stated that they would not have come if their employment was secured, and that they seemed to be happier with the standard of living in their original country than the Poles had been with their original standard of living. The inflow of funds allocated by the EU under the cohesion policy seems to have led to convergence in Portugal, at least until the country was hit by the crisis.

Nevertheless, both determinants (low wages and job loss) lead to the same implications – namely to economically stimulated migration, independent of whether within or between countries outside of the EMU.

Throughout all of the interviews, under each aspect of their decision-making process to migrate, the Portuguese participants regularly brought up how 'keeping a job' formed a steady problem in Portugal. Their aim was to escape this vicious cycle. The researcher did make a specific effort to dig deeper about the role of income levels with the intention of determining whether low income levels were possibly a plague, as they had been in the Polish case.

Jose also explained that he had been considering returning home in the coming summer, but he still had concerns: ‘few months ago, everybody in Portugal was talking that now we are getting in a good pathway, we are going there, there is no more crisis, but it is still crisis.’ Jose was very much influenced in his decision making by the shape of the economy in his home country.

Moreover, the researcher was interested under what circumstances the migrants would return, and to what extent the instable economy influenced their thoughts about their future. When asked if he would return in case he knew that he would earn higher wages, Jose answered, ‘Yeah. With some guarantees, yes, I would go back.’ Jose emphasised the necessary of ‘guarantees’, however, which further demonstrated how the situation is not only about wage, but also about the ‘security’ of a steady and sustainable income. Cruz provided a similar answer to the same question:

*The thing with salaries is that, if we feel that they are sustainable. So if I went back to Portugal, I would have to feel that the salary is sustainable. I would need to be able to think at least of 2-3 companies to get the same salary, if something went wrong with my company. Even like the golden special job is not good enough. (Cruz)*

Strikingly, the words ‘guarantees’ and ‘sustainability’ were mentioned often during the interviews. The strong insecurity towards the government was blatant. The unsustainable nature of the wages was grounded on the long-term employment problems that have been present throughout the last decade. In fact, Portugal has been plagued with long-term unemployment trends, which manifests one of the major problems of the country. The persistence of low periods of shortages in the labour market over multiple years has led to a pessimistic and insecure attitude towards the government, leading to migration to other EU countries.

#### 6.3.2 The lack of trust and confidence / pessimistic outlook as result of unemployment

The bad economic situation has deeply instilled negative feelings in the Portuguese people. Vanda and Cruz explained their mistrust as follows:

*Patricia: I think we would go back to Portugal, ehmm... if we had ...*

*Cruz: Let's say if the political situation changes in Portugal. Let's say it goes into another direction. . . . There was an opposition party that said okay this is the way. But that's not happening. We will change government, but the things will stay the same.*

*Researcher: So you don't get a feeling of security from your government?*

*Cruz: Not at all. (Patricia and Cruz)*

A notable observation from the interviews is that the Portuguese participants provided very lengthy and detailed descriptions in their answers about their lives. Their vivid engagement in the conversation proves the seriousness of their concern. Particularly, their lack of confidence in their own future was blatant, and the way they were plagued by long-term insecurity was evident. Their provision of a very detailed illustration on how the economy of the country was affecting their way of thinking proves how closely they followed the developments in the government even after leaving the country. Cruz representatively criticised the government by remarking of recent events that 'this is just a quick fix' and 'that is not really a change at all.' Cruz grimly concluded that 'The reasons why the crisis had happened – it could happen to anytime again and again.' This conclusion expressed his fears about continued instability.

The insecurity and lack of trust was manifest in all the participants. In response to the question on work–life balance, Duarte provided the following answer:

*Q: What about your work–life balance? Do you think your life quality here is better? The working environment?*

*A: It is easier here. You are not struggling. You don't feel threatened in your professional life. There is a lot of people looking for a job. Once you get a job you can feel that pressure but at least I am safe. That's also why I have kept two different jobs. It gives me more comfort when something goes wrong I always have the second plan. (Duarte, 2014)*

Duarte's reply was interesting in so far as everything seemed to revolve around the feeling of insecurity and about having a job. When asked about his work–life

balance, he instantly connected his thoughts with the feeling of security when having job. Moreover, Duarte was employed in two jobs, which is atypical for the London standards. He explained in the interview that the fact that holding at least two jobs at once gives him some kind of comfort. This shows how precautionary he is and how the fear of being unemployed still has a severe influence on him. In response to further probing about his willingness to return to Portugal, Duarte responded as follows:

*Q: Are you thinking of going back sometime later?*

*A: Not at all.*

*Q: What is keeping you here?*

*A: Ehmm, in professional terms I have a lot of more opportunities, that I haven't explored yet. England is not perfect. But at least I feel that the system works. You can rely on the system. You can rely on the transport, you can rely on the healthcare. So there is a lot of things. The market is flexible. You don't have those things. But you have those opportunities on a daily basis life. I don't expect to get rich or whatever. But just want to get a normal life. It wasn't possible before. I'm from Lisbon and Lisbon is not that bad. But I see how people are struggling to pay mortgages and losing their houses. Coming back to their parent's houses with their children. And even those from the higher classes. You would not expect it what really happens so. (Duarte)*

Overall, the responses expand the understanding of how intensely the Portuguese labour migrants long particularly for 'safety'. However, as the Portuguese government does not meet their expectations, the participants considered the possibility of returning to Portugal mainly in light of their feelings of insecurity, which they all underlined multiple times throughout the interviews. Given these results, one might question whether the absence of 'security' or 'trust' in the government might lead to higher mobility levels. Migration under this aspect has not been scrutinized yet in the literature. According to the statements from the Portuguese participants, they chose to move to another country as they considered their government to be incapable of responding to the economic imbalances. Thus,

the mistrust in the government and in the prospects on future policy making has a big influence on the decision-making process to move.

#### 6.4 Summary and conclusion

As part of the research design, the aim of the third case study was to explore the motivational reasons of labour migrants from an EU member state with a medium membership term length in the EU. Portugal was selected on the basis of being an EU member since 1986 and an EU country that has undergone some degree of significant convergence, as shown in the previous chapters. In addition, being one of the critical economies during the crisis, Portugal further provides an optimal example for the interrogation of labour migrants within the Eurozone.

Firstly, the sources of motivation to migrate have their origins first in the feelings of ‘insecurity’ and ‘lack in trust’ directed towards the Portuguese government. The ‘crisis’, which evoked a strong sense of ‘mistrust’ and recurring worry, formed the main cause to move among the Portuguese labour migrants. Whereas the Polish maintained that they wanted to move because they wanted to have a life, ‘to feel safe’ (in monetary terms) respectively was the main reason among the Portuguese. On a comparative basis, Portuguese felt a fear of total lack of income, as opposed to the pressure of steadily low levels of income reported among the Polish participants. In fact, low levels of income were never presented as the main or explicit reason why the Portuguese moved. This is perhaps unsurprising, as Portugal joined the EU four decades ago and has experienced convergence and adaptation to the EU average. The majority of the participants stated that if they had trusted their governments and been able to enjoy a sustainable income, they would have stayed; there was no mention of a desire for higher income levels. Social reasons were not important for most of the Portuguese and were rarely referred to. In contrast to the Poles, the Portuguese seemed relatively happy with their lives in Portugal outside of the unemployment issue. Certainly, as this research did not ask Portuguese migrants if they would have migrated had the external variable, unemployment not been present, it might be impossible to claim that social variables play no role at all. However, under the current circumstances, the high levels of unemployment and the divergence in unemployment levels seem to have had a major effect on the decision-making progress of the Portuguese labour migrants. One might ask further, what would

happen if the government starts to implement promising changes, and to eliminate the feeling of insecurity, which is the main stimulator to move among the Portuguese? The overall impression was that the migrants would not have moved had they held 'safe jobs' or 'sustainable income', and that they were happy in Portugal beyond the fear of unemployment. The neoclassical theory of migration is hence not entirely applicable to the Portuguese sample.

To conclude, considering the idea of free movement of workers within the EU and the neoliberal aims of the EU to increase mobility levels, both relevant case studies (i.e. Portugal and Poland) have confirmed that there is mobility provided there exists any form of economic stimulus, whether grounded on income differences or (the potential threat of) total lack of income. Yet, it is still important to ask the following questions: What are the fundamental ideas behind free movement of workers in the EU and labour mobility / intra-EU migration? Do the findings and facts – i.e. that people majorly move for economic reasons – correspond with the political aims and concepts/ideas of the EU institutions about achieving high labour mobility within European borders? Is it a good thing to have high mobility levels induced from wage differences (as no other options for high levels are available)? Is this the idea of the EU about 'labour mobility'? Moreover, are the given facts and theoretical visions compatible at all? The findings on migration and the concept of mobility of workers depict a controversial idea about vivid mobility levels in the EU.

## Chapter 7 Discussion and conclusion

### 7.1 Introduction

This research has addressed and explored intra-EU mobility/the free circulation of workers in the EU under the contemplation of the economic convergence agenda of the EU and the integration process in the EU. The three case studies, which were selected based on the length of their membership in the EU and degree of economic convergence, have helped to unfold and embed the migration patterns, the convergence levels, and the motivations of the labour migrants into one whole framework. The ultimate objective of this research was to build linkages between the three components and to reveal their interplay through descriptive statistics jointly with qualitative empirical data. The findings and their interpretations suggest that the examination of mobility levels within the EU borders under the scrutiny of social cohesion policy and convergence levels and their linkage to the neoclassical theory of migration suggest that mobility levels are not low. Instead mobility levels are in accordance with the expectations of the convergence theory and the migration theories. The neoclassical theory of migration suggests that individuals move as they respond to wage differentials. However, the social cohesion and regional policy seek deeper integration through economic convergence among the member states. This clash of two ‘opposing’ concepts represents a challenge to the main argument of the EU Commission, which states that mobility levels are low in the EU. If migration is regarded according to the propositions of the neoclassical theory, then mobility levels are not low between the converged regions or in the EU in general, but rather harmonized and in accordance. At the same time, this thesis has found that the economic aspect as part of the decision-making process is sometimes neglected, particularly much more so regarding mobility streams between economically similar regions. (In this case, labour mobility is not linked to economic theories, but explained on the basis of social activities.)

To what extent do the findings from this research thesis affect the manifest ideology of the EU on free movement within the EU? The findings are affecting the policy agenda of the EU in so far as they contradict the idea that mobility levels are low in the EU and hence need to be increased. As discussed in the previous chapters, with



the introduction of the Single Market in the 1980s and liberalization of the labour markets, the discourse regarding movement of workers in the EU has gradually changed towards aspiring toward 'high' mobility. After the introduction of the Single Market, the movement of workers ceased to be seen merely as a fundamental right. Labour mobility became an economic tool where high levels were regarded as essential for a smoothly functioning and powerful Single Economic Market. The Single Market was introduced in order to achieve a deeper integration across political and economic institutions through a closer economic union. Both economic convergence, i.e. the reduction of economic disparities among regions and the standardization of living standards, as well as high mobility levels constituted main components of this vision. Whether high mobility levels are regarded as useful due to their economic benefits, or whether mobility of the workers is supposed to be high for its own sake is unknown – in any case, the ultimate viewpoint of the EU Commission is that the levels need to be high. The question of whether high mobility levels are achievable in converging regions lies at the heart of this research.

This thesis, in order to test the compatibility of these two contradictory goals, has consulted the scientific theory of movement of individuals, i.e. the migration theories, tested these theories' application on EU labour migrants, and extracted the determinants of labour migrants. Fundamentally, this research examined migration or mobility levels in the EU under the framework of convergence and social cohesion. Unfolding the scientific concept of movement has contributed to a better understanding of the process of movement within the EU. This research has examined the theories of migration within the integration process, i.e. as a framework peculiar to the formation of the EU and with emphasis on the regional differences within the EU. The study of the motivation of EU labour migrants has given way to the knowledge that, in order to understand the irregular mobility streams in an integrated economy such as the EU, it is necessary to understand the influence of macro economic factors on the decision-making process of the individuals (i.e. potential labour migrants) on a micro level. The results have shown that movement by itself cannot be understood if the impacts of the macro structures on the decision-making process of the micro agents are not considered as one whole interlinked unit.

The evaluations of the data have shown how, according to the migrants' personal feelings, the reasons behind the migrants' decision to move are largely linked, influenced, directed, and determined by macroeconomic structures. The impact of the macro structures decreases with more convergence and cohesion, as prescribed by the regional policy of the EU. The lesser the influence of the external macro factors on the decision-making process, the more the motivations transform from economic to social determinants, and the fewer individuals who move. The social cohesion policy is one of the top priorities on the EU political agenda, and has been given increasingly more attention in recent years. The EU is currently pursuing two parallel goals with opposing theoretical concepts. The incompatibility of these goals, in practical terms, is resulting in allegedly low mobility levels, which are in fact not low, but moderate. The implementation of programmes to increase mobility levels in converged regions is henceforth questionable. Aiming at both convergence in the EU and increased mobility levels is, at least theoretically speaking, a contradictory effort. According to the consolidation/synthesis of the migration theories with the convergence theory, moderate or low mobility levels are symptoms of a 'healthy' economy. Migration is the result of the existence of economic disparities; convergence is the attempt to minimize economic disparities.

This chapter relates the major findings from the data collected in the three case studies to the literature. The findings from the Polish sample are compatible with the literature on migration theories, as the migrants mainly moved for financial reasons. Regarding the second case study about the German group of migrants, the results show that so-called barriers are not the explanatory factor behind the low mobility levels between economically similar regions, as suggested by the literature. Instead, economic determinants were substituted with social determinants, which were revealed as the real motivators behind the lower migration levels of movers between converged regions. This observation leads to the conclusion that economic variables, as the main stimulator of migration, are missing, so high levels of migration cannot be expected in converged regions. The case study on Portugal and the economic crises demonstrates how the large numbers of workers who migrated from Portugal to the UK were mobilized as a result of the crisis. The findings from this case study further confirm that high levels of migration are experienced in a cyclic form and are a result of financial or economic motivations and divergence. The complete findings

from the three case studies lead to the ultimate observation that the low mobility levels are the outcome of harmonized and integrated economies. High labour mobility levels, on the other hand, are a result of economic divergence and disharmony in integrated regions. Conclusively, the current intra-EU mobility levels between the states in Central Europe (a converged region) are not low, as argued, but in fact moderate and acceptable in regard to the principles of the migration theories.

The remainder of this chapter is structured as follows: The next section discusses the empirical findings by embedding the primary data into the literature and discussing its alignment, non-compliances, and variances. Next, based on the results, the most important findings are discussed in order to respond to the research question and the hypotheses of this thesis. Subsequently, the implications of the results in regard to the literature, as well as EU policy are discussed, including the expandability and the generalizability of the thesis. The thesis closes with a conclusive remark on the results and their significance for the EU.

## **7.2 Discussion of the findings in the context of the literature**

### **7.2.1 Applicability of the neoclassical theory of migration**

In order to answer the research question ‘Why do EU migrants move?’, the migration theories were ‘tested’ on the participants. In total, 25 Polish workers from the tertiary sector were interviewed in order to learn about their motivations to migrate. Based on the results from the collected data, the findings confirm that the Polish labour migrants came in the first place (and exclusively) to benefit from increased income levels. This finding confirms the hypothesis that the main driver of migration between regions with economic disparities is based on economic determinants. The results also exclude any types of non-economic (social) motivators as determinants to migrate. When asked about their main motivation to move to the UK, the prevalent answer was to find ‘a better life’. Behind this statement, the variable ‘higher income’ was the main (economic) determinant, affirmed by the total number of participants. The financial reason was never combined with any other non-financial considerations. This particular statement of the Polish participants reflects and complies perfectly well with the propositions of the neoclassical theory of migration, where workers move from low-wage, labour-rich countries to high-wage, labour-scarce countries or regions as a result of wage

differentials (Hicks, 1932; Lewis, 1954; Ranis & Fei, 1961). According to the neoclassical theory, higher income levels in the destination countries constitute pull factors, whereby the decision to migrate is affected by the aspiration for ‘income maximisation’ and by bypassing the wealth differentials. Among the Polish migrants’ answers, the variable ‘income differences’ was the predominant reported reason for migration. The results support the view of the macro level theory of migration, namely that many cross-border migrants start as target earners. The neoclassical theory constitutes one of a multitude of migration theories, but it describes best the motivations behind the migration streams from Eastern Europe to Central Europe, or in other terms, from non-converged to converged regions.

During the course of the interviews, the Polish migrant workers further expanded their explanation on how the purpose behind their movement, i.e. to have a life, was determined by the levels of income and wages. By seeking to having a better life, they meant the following: firstly, they sought a better life in terms of having more free time, which in turn had been denied to them due to the need to hold multiple jobs due to insufficient income. In other words, to have a life meant simply to cover the basic costs for the minimum life standards and, additionally, to have some savings in order to be able to enjoy social life in general. Drinkwater (2013), in his study on Polish migrants in England and Wales, used a similar fashion of qualitative analysis mixed with quantitative data, and extracted similar answers.

However, the ‘to have a life’ variable among the Polish is not comparable with the ‘to have a life’ statement of the German group. Among the Germans, the variable ‘to have a life’ was not the end product of working too many hours in order to earn more money. In the Germans’ case, the desire ‘to have a life’ stemmed from a poor work–life balance, which is a different issue. The Polish labour migrants stated that a single job was rarely sufficient to cover the costs of living. Sometimes even holding multiple jobs could barely cover the costs. This means that although they had two jobs, the wage differentials between the UK and Poland regarding the average minimum income levels were still too large, sparking the act or process of migration (neoclassical theory). In regard to this, the comparison of the wage levels have shown that in 2004, when Poland joined the EU, minimum wages in the UK were up to five times higher than the minimum wages in Poland. In any case, lack of income

or the perceived wage differentials was the main cause. In analysing the motivations of the different migrant groups, the evidence from the primary data provided an excellent resource to compare the data with statistical figures; the primary data highlighted the importance of the financial aspect when migrating. It is worthwhile to keep in mind that the provision of more money enables the enjoyment of life, which was lacking in the earlier lives of the Polish labour migrants. Financial gains build channels and are used to improve the standards of living on multiple levels. Higher income is a primary fundament for migration, as higher income increases the quality of migrants' lifestyle.

In the Polish case study, non-financial considerations were hardly mentioned. The general absence of any non-financial considerations is largely (but not always) confirmed among past studies applying the neoclassical theory to east-west migrants. In Heinz and Warmedinger's (2006) study on Eastern-EU enlargement and Polish labour migrants, the findings led to the same conclusion – namely that the 'key' determinants among Polish labour migrants were 'economic determinants'. Galgoczi et al. (2009) shared similar findings as well. Also in the context of the post-enlargement EU, Galgoczi et al. scrutinized the main macro drivers, which were responsible for labour migration – namely wage and income differentials. Their study confirmed Heinz and Warmedinger's (2006) findings, namely that the wage gap between the accession countries and the EU-15 was very wide prior to enlargement (especially when calculated at market exchange rates) and thus functioning as an important migration driver. With the eastern enlargement in 2004, diversity within the EU in terms of GDP per capita and wage levels grew enormously (Galgoczi et al., 2009, p. 15), thus fuelling the migration levels. In relation to this growing diversity, Maansoor and Quillin (2006) and Krieger and Maitre (2006) sought to determine the margin in their respective empirical studies. The two studies separately found that a wage differential of more than 30% had been set as a margin to override the costs and that the linearity relationship in the wages–migration tandem in fact does not hold. Both studies confirmed that income differentials (measured as GDP per capita) between EU8 countries and the EU15 average at the time of EU accession were greater than 30%. An exact calculation of the differences was not part of the present study. Both the degree of wage differentials as well as the level of the country income matters. The statistical

findings of the two aforementioned studies, both of which analysed the same variables as the present study, are complementary to the results gathered via the employment of qualitative data in this study. Generally, studies on east-west migration focus on quantitative methods; hence this research provides a good complement by using qualitative data. The effect of wage gaps through primary data and the effect of income level gaps through the triangulation with descriptive data have been examined and compared. The researcher not only tested the economic determinants tested but also explored whether other types of determinants were relevant.

A further point of interest was the examination of the ‘sensitivity’ of labour migrants to changes regarding wage differentials. Finding out the sensitivity of labour migrants towards income levels provides a source for future predictions regarding the behaviours of migrants and migration levels. The results from the data indicated that labour migrants from regions whose economies are still exposed to convergence are highly responsive to variances in GDP levels. When asked if they would have come if the earnings in the destination country had been equal to those in their home country, nearly all of the Polish migrants answered ‘no’. Simultaneously, when asked if they would return to their origin country if they earned more in Poland, the dominant answer was yes. Both responses confirmed that wage differentials are the unique motivators among migrants from ‘developing’ to ‘developed’ countries (Todaro, 1979). The results are compatible with the predictions of the results from a number of quantitative studies on east-west migration that generally claim that migration from the eastern countries will decrease with the diminishing of the wage gaps and income differences. In a similar fashion, Drinkwater (2013) asked his participants via interview about their intentions upon arrival and found that less than 20% of the sample size indicated that they intended to stay permanently.

‘Spontaneous’ (e.g. Barbara, 2015; Marcziek, 2015; Suzanna, 2015) and temporary arrivals are linked to economic gains, at least among those migrants coming from disadvantaged economies. Strikingly, the decision-making process of the migrants from Eastern Europe was highly spontaneous and risk-friendly, and moving was regarded as temporary, at least initially. This type of mobility undoubtedly yields higher levels of mobility in comparison to mobility in which the decision-making

process is based on thorough risk calculations and planned journeys. The statistics on the migration levels and their comparison with the timeline of the crisis further underline and confirm the findings from the qualitative data in relation to convergence and return migration. It has been discussed how the Euro crisis affected the UK GDP levels negatively, hence (slightly) converging with the GDP levels of Poland and how, since then, the number of Polish migrants to the UK has declined. In brief, convergence of GDP levels led to a decrease in migration levels. In addition, regarding the stayers and return migration, studies on Polish labour migrants provide data that suggests, while degree-educated migrants tend to stay abroad, those with secondary and vocational levels of education increasingly return to Poland (Anacka & Fihel, 2012; Drinkwater, 2013). Theoretically, this means a gain for the UK in terms of qualified human capital, but only if the migrants are used well and their skills are not wasted in the tertiary sector and in low-skilled jobs.

Furthermore, it is worthwhile to mention that in 2004 when Poland joined the EU, the unemployment rate in the UK stood at 4.8%, while in Poland it was 19.5% (Eurostat 2014). The youth unemployment rate specifically was at 40% in Poland (Eurostat, 2014). Despite these large differences in unemployment rates, the Polish labour migrants never mentioned unemployment or any difficulties in finding a job back home. In fact, in the sample group in this research, most of the participants were employed in more than one job back home.

The evidence in this study harmonizes with the fact that compared with other nationalities, Poles in the UK have high levels of employment and low levels of inactivity (IPPR, 2007). Other personal motives such as education enhancement, women's liberation/emancipation, and adventure or curiosity were not the main driving force of Polish migrant strategies. In particular, the paradigm of 'fluid migration' (Engbersen, 2012), which focuses on young and adventurous 'vagabond' acting with no clear strategy and a philosophy of 'intentional unpredictability' (Eade et al., 2007), certainly did not reflect the behaviours of a large majority of Poles moving to the UK according to this study. Decisively, the juxtaposition and coupling of a number of exemplification of observations and their examinations lead to the ultimate conclusion that the labour migrants would not have come if the wage gaps did not exist.

### 7.2.2 Applicability of the dual-labour market theory

The dual-labour market theory, which argues that the composition of the labour market in the recipient country can constitute a pull factor (Piore, 1979), was also thought provoking for the examination of the decision-making process of Polish labour migrants within the EU integration framework. Three facts were remarkable: Firstly, the Polish labour migrants reported relatively easy and uncomplicated access to the (low-skilled) jobs. Secondly, their earnings in one job in the tertial sector exceeded the earnings in up to three jobs simultaneously in their origin country. The comparison of the average minimum wages in the statistical data has confirmed the high differences in the wages. Thirdly, the flexibility in entering and exiting the labour markets in the UK (e.g. 'I came to earn some money and wanted to leave again', Ada) provided a good starting ground for migration and, thus, might have attracted them to stay longer. The combination of these favourable factors served perfectly well to meet the migrants' current 'primary' needs – namely to benefit from increased life standards by earning more compared to the wages in their home country in an easy and uncomplicated fashion, which undoubtedly might have eased their decision-making process to migrate. Drinkwater (2013) stated in his study how the (favourable) conditions in the recipient country may be reported to families back home. The employment patterns hence resemble the views of the dual-labour market theory, but the labour market opportunities cannot be classified as a determinant as the migrants never stated that they came because they had easy access to the low-skilled employment sector with relatively higher income.

Interestingly, the migrants deliberately chose to accept employment in the third sector despite their higher educational attainment, so their sector of employment seemed to be pre-determined. One study of the recruitment of A8 citizens was carried out on the eve of accession; in the study, all employers in the UK surveyed reported recruitment difficulties (Anderson et al., 2006). This was especially the case for low-skilled and some more skilled positions in agriculture, hospitality and construction. In Chapter 5, it was shown how the majority of Polish labour migrants were employed in hospitality and construction, confirming the compliance of the findings from the qualitative data with the descriptive data. This particular situation reflects the dual-labour market theory, which contends that migrants accept the low-



skilled jobs that native workers refuse to accept due to social status and prestige issues (Piore, 1979). A large majority of employers had tried to recruit domestic workers and raised pay and non-wage benefits, but still shortages existed (e.g. Anderson et al., 2006). One key finding, to be repeated in several other studies in the ensuing years, was that two thirds of employers in agriculture and food processing and 40% in hospitality complained that UK workers were difficult to recruit because the work was physically demanding and ‘not glamorous’ (Anderson et al., 2006; McCollum and Findlay, 2011; Migration Advisory Committee, 2014; Rogaly, 2006). The figures are equal to the theorizing of Piore (1979).

When asked during the interviews whether they had tried to apply for white-collar positions, the unanimous answer was no. The reason for not trying was insecurity in communication, i.e. language barriers (e.g. Marianna), particularly in the beginning when the migrants were new to the UK. Drinkwater (2013), however, found that most of the Polish labour migrants who came to the UK assessed their own languages skills as ‘very good.’ Although the dual-labour market theory is not the main theory which explains the large migration streams (as when migrants were asked ‘why did you come?’, none of them answered, ‘Because it is easy to find a job in the UK’), it does help to explain the employment patterns and how the composition of the labour markets plays an important role regarding the types of labour migrants they attract. Overall, the case study on the Polish migrants via the triangulation of quantitative with qualitative data proves that high numbers of migration levels are induced by economic determinants and that social motivations are lacking, thus meeting the demands of the hypothesis, namely that migration levels are high because labour migrants move in order to profit from financial gains in converging regions.

Concerning the exploration of the motivation of the German workers who came to London to work, the results in this research suggest that their decision-making process was predominantly based on social values. The neoclassical theory, which proposes wage differentials between regions are the main cause to move, is thus entirely negligible, as expected, as the level of standards of living and/or income levels between the UK and Germany are similar rather than divergent. Instead, the human capital theory, the micro version of the neoclassical theory, provides a

suitable base for identifying the motivations of the Germans. This model implies at the micro level that the migrant's goal is to maximize utility by choosing the location that offers the highest net income, in which would-be migrants respond to differences in wages across labour markets in different geographic locations without consideration of the differences in the standards of living (Sjaastad, 1968). Before moving, the individual undergoes a cost-calculation and decides on the employment opportunity, which will provide the highest income and thus maximize its utility. This approach was observable among some of the workers in the sample group who came from Germany to the UK to work, but the approach did not apply to the entire group. Whereas 'in order to earn higher income' was only very rarely stated, participants often stated that they came to improve their skills. In this case, their motivation to move was based on the acquisition of certain skills, such as professional skills, communication skills, etc., which they would eventually use once they returned or moved on their employment careers and which hence would enhance their human capital profile. Although this is not an explicit economic activity, in the long-run, it will pay off economically as they increase their personal profiles. As Sjaastad (1968) argues, a prospective migrant calculates the value of the opportunity available in the market at each alternative destination relative to the value of the opportunity available in the market at the point of origin, subtracts away the costs of moving (assumed to be proportional to migration distance), and chooses the destination which maximizes the present value of lifetime earnings. The majority of the Germans immediately responded that they came as they were 'attracted' to the city, without linking their motivation behind their decision-making process to migrate to any economic activity. Certainly, this observation does not entirely exclude the fact that they still may want to improve their skills. However, as per the nature of the methodology of this research, the 'first' mentioned reason equals the most important and thus as the major cause.

As they did not refer to any income related motivations by themselves, the interviewees were asked directly about the role of income. Their responses confirm the assessments above. Income was less important for them and thus negligible. On the contrary, quite a few confirmed that they took up jobs despite knowing they would earn less. For those migrants, social life was very important. For instance, they stated how they were 'bored' in Germany or unhappy with their social lives, or

they were simply curious and adventure-hungry and felt confident that they would find a job in London. This behaviour less emphasized seeking for opportunities, but allowed social activities to dominate the decision-making process.

On an aggregate level, the group of German migrants, whose motivations were less economic, constituted the group of people with 'low' levels of mobility, compared to the Portuguese or Polish migration streams. The motivations of both the Portuguese and Polish groups were more, if not almost purely, economic. Therefore, it is crucial to ask at this point: How does the EU want to achieve increased mobility levels, if the mobility motivations are not based on the type of determinants which are usually responsible for 'high' streams of mobility levels (see Poles and their motivations)? Regarding the migration theories, there is no prominent migration framework or migration model, which is used to describe the phenomenon of social movers who turn into labour migrants within the EU. There exist some sporadic and independent studies that address the social factors when migrating, but there is no known strand of literature on social factors as is the case for economic factors, e.g. the neoclassical theory. Only recently has the literature in general started to focus more on this issue, for instance, O Reilly & (2009) coined the term 'lifestyle migration'. Though this field is still very new, however, it may gain more importance in the near future.

One may further maintain that economic determinants as motivators are linked to the unskilled labour movement, and social determinants are linked to skilled labour. This point needs to be distinguished as it may affect the validity of the research question of this thesis. In order to test this argument, this research interviewed skilled as well as unskilled labour migrants in the German group. The objective was to find out whether unskilled or low-skilled workers from Germany migrate for economic reasons. Had the outcome been positive, the main argument of the thesis, that migration in the EU occurs according to convergence degrees between countries, would have been falsified. However, the low-skilled German participants who came to work in low-skilled jobs in the UK came exactly for the same reason as the other German participants – to get pleasure and to enjoy life, or to improve their social skills. Higher income was unimportant.

Regarding the Portuguese migrants, whose country has been a member of the EU for longer than Poland, the point of interest was to find out how they related to income

differences during their decision-making process to migrate, as Portugal has converged with the EU average regarding the standards of living to some considerable extent. Based on the qualitative data, the main reason to migrate was unemployment, with 100% accuracy within the sample group. Income or wage differentials were insignificant. The Portuguese labour migrants referred repeatedly to a 'lack of security', fear of the future, and pessimism about their future lives in Portugal, and all these factors were related to fear of being unemployed. They also asserted that they would not have come if they had felt safe regarding employment prospects in their home country. They seemed happy regarding the standard of living in Portugal, which has converged over the last years with the UK. The UK did not seem attractive for them at all, other than employment opportunities. Again, this behaviour provides evidence how 'high' mobility is linked to dissatisfaction with diverging economies. Divergence leads to migration. There exists no major migration theory which explains the decision-making process based on the variable 'unemployment', even though unemployment can cause large streams of outward migration. Whether this type of cyclical migration, which occurs during irregularities and divergence, represents the idea of 'labour mobility' that the EU had in mind is highly questionable. Ultimately, the case study on the Portuguese south-north migration exemplifies how larger movement of workers occurs during times of divergence (crisis), as opposed to convergence.

### 7.2.3 Applicability of the Network Theory

Although networks did not qualify as determinants in the interviews, regarding the Polish labour migrants, networks still seemed significant in the decision-making process to migrate. Whereas determinants explain 'why' individuals move, network theory explains how networks provide channels to move. Within the framework of this study, networks turned out to be denominators of 'where' to migrate in the case of migrants from Eastern Europe, but played absolutely no role regarding movers between Germany and UK. All the participants in the Polish group stated that they had known someone before they came. Although they also said that they would not have come if they had not known anyone, the validity of this answer is questionable, as wage differentials were the predominant cause to migrate and not networks. A similar use of networks was observed among the Portuguese sample. Regarding the

Germans, interestingly, networks did not play a role at all. When asked whether they knew someone before they had migrated, the prevalent answer was no. When asked whether knowing or not knowing someone mattered in their decision-making process, again, all of the participants in the German group confirmed that networks did not play a role at all, but they were confident that they would meet people soon. The different attitudes towards networks among the participation groups suggests that migrants with less financial back up are more reliant on help from their social capital when migrating. In conclusion, networks contribute to the understanding of the migration schemes and patterns, but they are too weak or simplistic to be considered as ‘determinants’.

#### 7.2.4 The role of language when moving

Language seems not to be a barrier to move, according to this study, for those who have the ‘right’ motivations to move. Of all 69 participants asked in this research, zero conceived of language as a barrier strong enough to dissuade them from moving. Certainly, otherwise, they would not have been in London. When asked whether language was a problem, the answer was yes; they felt that language was a problem – however, not an insurmountable one. Although most of the interviewees, around 85%, across the groups were insecure about their language skills, they all still decided to migrate. These findings conflict with the arguments in much of the literature. For instance, Okolski (2014) found out that over two thirds of those arriving between 2001 and 2011 (‘new arrivals’) said they could speak English well or very well, with only 3% being unable to speak the language. Of all new arrivals, just 5% said their main language was English (Okolski, 2014, p. 15). However, most of the studies, including Okolski’s, which have examined the significance of language whilst migrating, have concluded that language constitutes a barrier. This conflicting finding may be due to past studies’ methodologies: most were based on ‘assumptions’, meaning that the researchers asked ‘potential’ migrants who had not moved and not gone fully through the decision-making process. This study, in contrast, asked those who had migrated and found out that among those who seriously considered moving, language was not a barrier, despite the acknowledgment of the lack of the skills.

The participants even noted that despite their lower language skills at the point of their arrival, they had been highly confident that they would learn the language over time and considered it as a surmountable problem. Many of the participants were ambitious in language improvement and went to language classes. The argument that 'language constitutes a barrier to move' is contradictory in various ways. In one study where the proficiency of English was tested in more than 50 countries, Poland was given a 'high knowledge' mark (together with Austria, Belgium, Germany, and Hungary), just behind the 'very high knowledge' which was attributed to four Scandinavian countries and the Netherlands (Gazeta.pl 2012).

The same findings were applicable for the German group: based on the results from the empirics, language generally does not present a barrier to move at all. The main observations among the German group was that they came to the UK as they wanted to 'work in an English-speaking environment.' Language, instead of being a barrier, may even hence be regarded as a pull-factor. The German professionals also repeatedly reported how they were offered a job directly from recruiters or internal contacts thanks to their German language skills. According to their own estimates, none of the participants possessed impeccable English skills (even though most of them held high-skilled jobs). Before moving to the UK, the interviewees were perfectly well aware of their unsatisfactory English language skills. Some of the migrants even stated their doubts about the sufficiency of their skills for a job in an English-speaking country. Nevertheless, their perception about lacking language skills did not seem to constitute a barrier to migrate (otherwise they would not be in London now). Despite their awareness and worries about their communication skills, they still chose to migrate, similar to the Polish group. None of the German interviewees cited that their language deficits ever composed a serious concern regarding their decision to move or not to move. While the data from this study does not allow the researcher to assess whether language is a barrier on average, clearly for those who did move (and thus were not disincentivised from moving by any potential barrier), there were factors that mitigated the language difficulty.

#### 7.2.5 Divergence and Migration in the EU

The research further added a third case study on Portuguese labour migrants who came to the UK to work. Portugal was hit by the crisis in 2010-11 and was affected

by high unemployment rates already before the crisis started. The case study on the Portuguese was used to show how EU citizens have a higher tendency to migrate in times of wage differentials or divergence. The findings have shown how the majority of respondents used the factor unemployment behind their motivations to move. The major determinant was identified by the very first answer, which was in this case unemployment. When asked further about their motivations, whereas wage differentials seemed less important, social or lifestyle factors were sometimes mentioned, but not often. Although Portugal has not fully converged with the EU regarding GDP levels, keeping in mind that the capacity for full convergence is relative, in terms of standard of living based, Portuguese people gave the impression in the interviews that other than the high levels of unemployment, they seemed to be quite satisfied with their lives in Portugal. Migrating, in their case, would not contribute to a significant change in what concerns the quality of their daily lives. Therefore, Portugal provides a good example how people in converged countries are less motivated to move, unless their country experiences major economic disharmony such as high unemployment levels. The sample group included both skilled and low-skilled workers, and the variables have not changed between the two types of labour migrants. If Portugal did not experience employment difficulties, then the variable 'unemployment' as a stimulant to move would be missing, and the levels of outward migration would be lower, as the participants from the interviews did not mention any other variables behind their motivation. Regarding intra-EU migration, outward migration levels from countries who have been a member state of the EU for a considerable amount of time will decrease.

Moreover, in regard to Mundell's OCA theory, which stipulates that high mobility levels are required in integrated economies and in the EMU as they serve as an adjustment mechanism during asymmetric shocks, based on the findings from this research, labour mobility did increase as a result of asymmetric shocks. Although this research did not look at labour migration within the EMU only (as the UK is outside of the EMU), the research might still contribute to the understanding of the migration patterns labour migrants during the crisis. Henceforth, large flows of workers, as in the case of Portugal and south-north migration, are a cause of divergence, and not convergence.

### 7.3 Findings and the research question

The main objective of this research study was to unfold the motivational determinants of EU labour migrants and assess their behavioural tendencies in regard to convergence and standards of living within the EU. The hypothesis made in the beginning of the study was that, between regions with relatively similar standards of living, the opportunities to increase utility maximization of an economic nature is lower or even absent, which implies that mobility levels between converged regions cannot be high, as economic incentives are missing. At the same time, this research has focused on the motivations of migrants from different regions and found that the determinants vary across regions and, accordingly, so do the standards of living between the destination and the origin countries, i.e. the economic convergence levels. The motivations between west-west labour migrants were mainly linked to social activities rather than to economic investments. Based on the findings from the empirical data, the human capital theory, which explains economic movement on the micro level, is insufficient to explain the migration of Germans to take jobs in London, as economic determinants were missing (at least among the main reasons). Not only is it the case that opportunities for human capital development are less nuanced for the Germans, as they are already relatively high regarding the levels of standard of living; moreover, most of the time, Germans' aspiration to seek for opportunities to build their careers was frequently missing and replaced with purely social motivations or types of determinants.

Ultimately, the findings from the primary data support the hypothesis that in the absence of economic stimulants, mobility seems less likely. At the same time, the findings provide a very interesting and new insight, namely that social motivations seem more important than ever, most of the time being the predominant reason to move among those who move between regions with similar standards of living. The conventional approach was to explain high migration levels on the basis of economic stimulants, as per the neoclassical theory of migration. The chapter on the Germans, though, has shown that even though economic stimulants were missing, Germans still move. In the Polish group of participants, higher income was the main reason for moving. However, the Polish migrants also often mentioned that social activities were also important – basically, income was the tool to rise the quality of their life



via social activities. Therefore, migration does not seem to come to a halt when wage differentials are missing (Todaro, 1976), as stipulated in the neoclassical theory of migration. Rather, the figures decrease drastically. The stark increase of the use of social media, which provides a channel for information distribution, is out of the scope of this research but may well provide another explanation for the ‘slight’ increase of intra-EU mobility.

Based on the findings, social stimulants may constitute a major tool to enhance mobility between converging and converged regions in integrated regions such as the EU in addition to economic stimulants. Whether social aspects as a catalyst for migration could ever reach the same intensity as a catalyst for mobility and migration would provide an entirely new platform to study intra-EU migration and mobility. In this study, the frequent mention of social elements may provide an impetus to better understand intra-EU mobility. In any case, firstly the absence of economic stimulants in converged regions, and secondly the unanswered question of whether social determinants are stark enough to yield high mobility levels, lead to doubts as to whether high mobility levels can ever be achieved in a stable EU, and therefore call into question the aim of the EU to have high mobility levels in successfully integrated regions.

#### 7.3.1 Economic impact of (high levels) of labour migration in the UK

There are manifold reasons why labour mobility is regarded as beneficial for the economy. Firstly, from an efficiency point of view, mobility allocates the capital and skills to the place in which they can be used most productively: a more integrated single market, in which economic growth is boosted by the possibility of more seamless cross-border trade and collaboration. Secondly, (high) mobility levels are regarded as essential as a means of achieving convergence between EU regions, particularly in the case of short-term growth differentials, for instance as seen in the case of Portugal, where unused labour in high-unemployment places is allocated to areas like the UK, where employment growth is robust.

Therefore, it is important not only to ask how mobility levels are achievable, but also to be aware of the consequences of high mobility levels. These are not well researched yet, as so far it has been generally assumed that high mobility levels are a good

thing. The example of the large Poland–UK migration surely has provided impetus to rethink high mobility. Labour mobility is important, but it is still just one tool out of many that can curb the economy. That said, one can even ask if labour mobility is indeed necessary to create convergence, namely convergence of the labour markets, and deeper integration.

Moreover, one may postulate that, rather than divergence leading to high labour mobility, convergence leads to more mobility. Certainly, integration and cohesion across the labour markets may in fact enable and facilitate more mobility. This standpoint has not been addressed in this research. When the Single European Market was introduced a few decades ago, barriers were eliminated in order to deepen integration. Nevertheless, intra-EU mobility has not increased since (Zimmermann, 2008). This outcome could be interpreted to mean that deepening integration has not led to significant changes. Convergence and social cohesion across the EU member states eases, but does not necessarily prompt, mobility. At the end of the day, the ultimate reasons for migration are based on personal motivations defined by determinants involved in the decision-making process.

The only considerably high levels of migration have been the east-west and south-north migration streams. Regarding east-west migration, the impacts of the Polish migrants have been researched relatively well in the literature. Although this research did not attempt to measure the impact of migration levels (rather, it scrutinized the motivation of EU citizens), it is worthwhile to link the findings from this study to studies on the impact, as doing so may support future questioning of the necessity of mobility levels.

Based on a summary provided by Migration Watch (2014) the impact of immigration into the UK on GDP per head – the key metric measuring prosperity – is essentially negligible. The summary is based on three major reports that measured the impact by the GDP per head. In the first report, which came from the Economic Affairs Committee of the House of the Lords in 2008, the conclusion was that ‘immigration has very small impacts on GDP per capita, whether these impacts are positive or negative. This conclusion is in line with findings of studies of the economic impacts of immigration in other countries including the US.’ Similarly, the second report, which was by the Migration Advisory Committee, stated that ‘HM Treasury

estimated that a reduction in annual net migration of 50,000 could result in a negligible one year reduction in GDP per capita growth.’ The third report came from the National Institute of Economic and Social Research (NIESR), the UK’s longest established economic research institute (founded in 1938). The NIESR modelled the impact on the UK’s economy of the immense net migration from 2004 to 2009 of around 625,000 migrants from the eight Eastern European countries which joined the EU in 2004. The conclusion of their study is also that ‘the long-run impact on GDP per capita is expected to be negligible.’ It is important to scrutinize not only why mobility levels are low, but also how beneficial high levels would be.

In discussions about whether excessive migration levels have a negative impact on the national economy, sometimes critics specifically highlight the high youth unemployment levels in the UK. Other studies have reported how a link between immigration and youth unemployment can be observed (Migration Watch, 2014). Still other research projects conclude that there is no evidence that immigration influences wages or unemployment at all (Eldring & Schulten, 2012). On the contrary, for example, Eldring and Schulten (2012) argued that immigration is likely to have reduced the natural rate of unemployment in the UK. Under the judgement of the dual-labour market theory, the claim that immigrant labour is partly the cause of high youth unemployment and thus a negative factor for the national economy is not justified, as according to the theory, the immigrant labour force takes up or fills only positions which are rejected by the local population due to ‘social status’ or similar concerns (Piore, 1979). Experiences from the UK labour markets as well as the data confirm the applicability of the dual-labour market theory.

Moreover, Dustmann and Frattini (2013) investigated the contributions of immigrants to the UK tax and welfare system and found that migrants from the European Economic Area have put more money into the system than they took out (approximately 33% more) and that recent immigrants are 45% less likely to claim benefits or tax credits than the UK’s native population. It is noteworthy to mention that only one of the participants in the present research study mentioned ‘benefits’ at all.

However, although labour market effects are notoriously difficult to estimate, there is tentative evidence to show that some immigration has had negative effects on

the employment of UK-born workers. Specifically, a report by Migration Watch (2014) found that there is substantial anecdotal evidence that workers in some sectors of the economy have suffered more than others from competition with migrant labour. The IT industry is one such sector. Notably, perhaps the most serious concerns regarding migration in the EU relate not to the economic scale, but rather to the social scale, e.g. the impact of migration on housing or, ironically, on the ‘cohesion of the society’ (Migration Watch, 2014).

### 7.3.2 Migration: Why low mobility levels are not necessarily ‘bad’

Considering the root causes of high mobility levels so far in the history of intra-EU migration, high levels of mobility do not especially seem to represent a ‘good’ thing. The examples of east-west and south-north migration have shown how larger sizes of migration are induced by economic inequalities between regions, namely wage gaps in the east-west example and unemployment in the south-north example. Both instances of increased mobility levels are the product of inconsistency and disruptions in the national economy cycles. One of the main proponents of a successfully integrated economy is the reduced economic disparity between the regions coupled with it and, according to the migration theories, disappearance of high migration levels. In other words, in successfully integrated regions, under the framework of migration theories, lower mobility levels are actually a sign of a well-integrated and functioning economy.

The question to ask seems to be how much mobility is actually beneficial as a whole, or how much is needed to meet the interests across all of the EU states. Rather than aspiring for just ‘high’ levels, more efficient ways of allocating the labour supply and demand should be considered. EU citizens should be able to move freely and their decision to move should not be limited, but free movement should not necessarily be equated with high levels of movement.

### 7.3.3 Implications for EU policy

First and foremost, regarding intra-EU migration, it is highly recommendable to re-think and revise the understanding of the concept of movement of workers and mobility of levels. The integration of the EU is an ongoing project on a very large

scale, whose dynamics are influenced and change on a constant base. The enormously fast rate of technological change, globalization and the increasing influence of social media on the patterns and habits of the EU citizen altogether constitute a grandiose challenge to the changing expectations of the people living in the UK, as well as to the EU as a global player. If the EU wants to maintain its economic global power, then it must seek to attain economic superiority on an aggregate level, and undergo adaptations in order to remain powerful, which is in turn also dependent on the welfare of the nation states as individual organs. At the same time, the well-being and security on social as well as economic terms of the EU citizen should not be maximized.

In regard to mobility levels in the EU, ignoring the scientific theory behind movement when introducing policies related to mobility will lead to inefficient results, such as the Job Action Plans or Job Mobility Plans, which turned out to be failures despite heavy financial investment. Rather, it is advisable to invest in the research and redefine ‘what makes a migrant’ or ‘mover’ within the framework of the EU based on what determinants individuals react to and how. Once the nature of movers between converged regions is better understood, appropriate incentives can be created in order to feed the motivations of the potential movers between regions with similar standards of livings or similar quality of lives. The motivations of labour migrants in Central Europe have not been researched well enough, but this study has revealed how they can be fuelled by unique determinants just like their counterparts from the lesser developed regions. It might be hence useful to revise migration studies by creating a new framework, which includes the movement of workers in converged regions.

To modify the levels of workers’ mobility, one needs the right tools. The strategy of eliminating barriers has been rather unsuccessful, as shown in this research. Future research must find out what really stimulates migration, and then possibly test whether incentives can be created to prompt the right type of motivations. For instance, the attraction of (skilled) workers through incentives such as higher payment (wage gap as a tool) may lead to success on a very small scale only or not at all; as shown by the German case study in this research, higher pay is no longer a motivation once a specific threshold of standard of living is reached, financial satiety

is reached, and economic motivations are eliminated. Alternatively, occupational redeployment may allow the EU to maximize the allocation of workers and thereby to maximize economic benefits. Even offering training, for instance, for highly skilled migrants currently employed in low-skilled jobs could support profit maximization. The Polish case study has shown how insecurities in language skills were a major reason why qualified migrants did not try to enter high-skilled jobs, and hence remain underutilized human capital. Targeting those groups, e.g. via setting up language courses or qualification adaptation courses, may turn underused labour capital into a highly valuable labour force and address demands in skilled jobs, thus empowering the labour markets in the EU.

#### **7.4 Generalizability and expandability: Implications for further research**

The dissertation advanced a number of hypotheses tested and analysed them via three case studies, which served to answer the research question asking why mobility levels are low in the EU. It applied and tested migration theories on three sample groups from economically different regions, and scrutinized the applicability of the theories under the consideration of the social cohesion policy and convergence theory by linking and comparing qualitative data to descriptive data. This constellation of framework has not been applied before and is the first of its kind. The research has detected the limitations of certain approaches and a lack of theories of migration, and assessed that the ‘low’ mobility levels are not low, but in accordance with the migration theories. The examination of the interplay of determinants and regional differences, which integrates the migration theories together with the convergence theories, can be used as a fundament for future research on intra-EU migration.

The research has identified and revealed a number of causal patterns and factors regarding the decision-making process to migrate among the three case study groups. Regarding the comparability of the decision-making process on a regional basis within the EU, this approach can serve as a starting point. The determinants from this research can be tested on the whole of the EU and can be clustered according to regional differences. The general structure of the research, i.e. identifying the determinants and differentiating them according to regions, is likely to translate to other countries in the EU. Certainly, there may be some deviations where unexpected

factors may play a role or where determinants vary according to the economic structures of the individual countries. Nevertheless, the scheme used in this research is highly likely to be transferrable to an EU level. Even if other causal factors or determinants not studied or identified in this research influence the decision-making process in another country, the framework is broad enough to accommodate such modifications.

### **7.5 Implications of the findings for theorizing migration streams**

This research study has proven again the difficulty of consolidation of migration determinants into one straightforward framework. The study has tested the patterns of the various mobility streams within the EU according to their levels where finally a pattern according to the types of determinant crystallized. The empirical research found that the economically motivated groups yielded higher numbers of labour migrants and that, when these types of determinants were missing, migration levels were lower. As evidenced by the migration levels, the motivation to migrate is higher among those who exhibit economically motivated determinants, but lower among those who exhibit more social variables instead. In short, migration levels are starkly defined by the types of determinants behind the motivations. The types of determinants, in turn, depend on the level of the origin country's economic strength relative to the EU's average. The hypothesis has been tested on the two sample groups, but can be reflected on a larger scale as well. The sample size in this study is too small to generalize the findings, but similar findings are expected even from a larger sample size, in terms of participants as well as country numbers. Then, presumably, some variation might be observable regarding the determinants, e.g. economic determinants might be combined with social determinants. However, the crucial factor is the weighting of the variables when defining mobility levels. Presumably, whenever economic determinants prevail or outweigh social determinants, mobility levels will be relatively high. If this relationship was observed in multiple countries, then one could speak of the elasticity of the determinants towards mobility levels. At the current stage, these are merely assumptions based on the results, but future studies may further expand and test these suspicions.

In studying the determinants behind the motivations to migrate within the EU, the study chose three different case studies to separate the migration processes according to regional differences. The Polish case study scrutinized migration and its determinants between converging and converged regions. The results have shown that the neoclassical theory is applicable to a large extent. The decision-making process in the German case study, however, could be better explained on the basis of the human capital theory. In addition, the Germans' motivation was based on social determinants. There exists some literature (e.g. O Reilly, 2009) which looks at migration as a lifestyle factor; according to such literature, lifestyle migrants like the German migrants in the present research are 'relatively affluent' (O Reilly, 2009) and do not move because of economic hardship. One characteristic of lifestyle migrants incompatible with the profile of a typical migrant in the EU is that lifestyle migrants can be any age, 'but they tend, on average, to be older and many are retired or semi-retired' (O Reilly, 2009, p. 123). Hence, the German sample, which averaged at between 22-32, was not exactly representative of lifestyle migrants by definition. Nor can they be categorized as economic migrants. Although they did move for work, employment was not a direct reason for their motivation to move, which was rarely described as work-related. One can thus say individuals moving west-west are social migrants disguised as labour migrants. Within the studies of labour mobility in the EU, although the studies of the determinants of west-west or EU-12 movers are not related to a specific (social) migration theory, such as the neoclassical or economic migration theories, social determinants seem highly important for the context of labour migration in the EU. Therefore, this research study suggests that future research consult and build more on social theories as well when examining intra-EU migration, particularly among west-west (converged) movers. As the ultimate aim of the EU is to achieve overarching convergence between all member states, the socially motivated movements of workers will undoubtedly become more significant for future research.

If mobility levels are to be influenced or changed, then the EU policymakers must understand the stimulants of mobility levels, i.e. the type of determinants behind the motivations to migrate. Ignoring the positioning of mobility theories and their significance in regard to policy formulations can decrease the effectiveness of mobility programmes. The liaison of the determinants with levels of regional



disparities and macroeconomic structures may provide an even stronger tool to modify mobility levels, or at least to understand under what circumstances they can be modified.

In summary, this research has found that no existing migration theory can explain the movement of people between converged regions. Hence, the examination of intra-EU migration and mobility within the EU calls for a new approach. Together with the findings, this study may provide a basic fundament for development of...

- a migration theory which looks at migration according to convergence levels / standard of lives,
- a new migration theory based on the explanation of social determinants only,
- or a combination of both of these.

Any new approach to researching migration in the region should view migration as a link between exogenous and endogenous factors and accept that migration dynamics play out according to a broader set of elements on various dimensions simultaneously, such as on the macro as well as micro level. Such an approach would be more hierarchical in its analysis, introducing a series of variables related to structural change on a macro level and to the effect of this change concerning the decision-making process on the individual level. This is just a suggestion and has not been tested yet. The starker presence of social media induced by globalization and advanced technology has produced changes regarding the socioeconomic structure within the population. Such dramatic structural change has produced a new empirical reality to be studied by existing migration theories, which were often developed in very different contexts. Migration research tools and theories thus need to be completely rethought in the European context, which is specific due to the 'scale of these societies, the historical nature of nation building and migration, and the transnational context of the European Union' (Favell, 2008, p. 264). Indeed, European national cases are not directly amenable to the habits of analysis that work well in the US.

## 7.6 Concluding remarks

The aim of this research was to contribute to a better understanding of mobility and mobility levels within the EU and as part of the European integration process. The research has shown that high migration levels are not necessarily highly desirable, as they do not have a significant positive economic impact. Quite on the contrary, high migration streams of workers can bring about a large strand of socio-economic problems. As outlined in Chapter 3, on the outset of the EU, increased levels of labour mobility were never really desired or considered as highly beneficial. Liberalizing the markets and reducing barriers should not be equated with increasing mobility levels. Possibly, low or moderate labour mobility levels may be regarded as the better option. The history reiterates, as outlined in the first chapter of this thesis, when the EU was just established as the ECSC, the core member states who made up the stronger economies and who were exposed to potentially high figures of incoming migrants were just as careful and sensitive to opening the borders as the UK is today. The major objective of this research was to critically analyse whether the two main objectives on the political agenda of the EU – convergence and increased mobility levels – constitute a harmonious or feasible couple. By scrutinizing the science behind migration and mobility in the context of convergence, and by linking the results from primary data with descriptive statistics, this research came to the conclusion that one cannot have high mobility levels of workers in converged regions.

Additionally, the structural forces which define mobility levels and (intra-EU) migration show that it is not always in the hands of the policy makers to pre-set the levels, as migration and mobility are an outcome of economic interactions, which, under particular circumstances, surmount all possible kinds of barriers. Sometimes, it is not the individual states or supranational institutions, but the characteristics of labour markets, diaspora, or other factors, which dictate the direction and intensity of migration and mobility levels. Hence, if mobility levels are to be influenced, it is first necessary to understand the dynamics of macroeconomic structures and their impact on the decision-making process. A new framework of studying intra-EU migration, specifically a framework which joins the concepts of migration, mobility, and changes in standards of living or even quality of life into one united theoretical

construct, therefore is considered as essential in order understand the movement of workers in integrated economies.

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## Appendix

### 1. Interview Participants

#### Polish Interviewees

Name	Age	Working Sector	Higher Education
Ania	22	Shop Assistant	Yes
Basia	32	Catering Staff	Yes
Mateusz	24	Catering Staff	No
Martyna	20	Catering Staff	Yes
Ada	28	Catering Staff	No

Malena	28	Catering Staff	Yes
Julka	32	Shop Assistant	Yes
Milosz	35	Shop Assistant	Yes
Aneta	22	Coffe Shop	Yes
Amelia	25	Coffe Shop	Yes
Adrianna	22	Coffe Shop	No
Milena	30	Restaurant	Yes
Maja	24	Restaurant	Yes
Emil	25	Restaurant	No
Ala	31	Shop Assistant	No
Hania	25	Restaurant	Yes
Dawid	32	Restaurant	Yes
Marysia	24	Restaurant	Yes
Cezar	33	Shop Assistant	Yes
Sonia	28	Catering Staff	Yes
Ewlina	22	Coffe Shop	Yes
Aleksy	31	Shop Assistant	Yes

#### German Interviewees

Name	Age	Working Sector	Higher Education
Anton	23	Sales in Media	Yes
Alissa	25	Internship Recruiter	No
Franja	24	Travel Agent	Yes
Ramon	31	Content	Yes
Anette	19	Au Pair Nanny	No
Louise	19	Au Pair Nanny	No
Veronika	20	Au Pair Nanny	No
Christine	22	Assent Manager	No
Jörg	29	Broker	Yes
Ruben	26	Financial Analyst	Yes
Arnold	28	Software Engineer	No
Timur	29	Web Strategy Manager	Yes
Jeanette	28	Sports Agent	Yes
Olivia	29	Sales in Media Desing	Yes
Ernst	34	Sports Agent	Yes
Gabi	29	Sales in Tourism	No
Marie	27	Shop Assistant	No
Lukas	24	Waiter	No

Simon	24	Shop Assistant	No
Fred	24	Barman	No
Rosi	25	Coffee Shop	No

#### Portuguese Interviewees

Name	Age	Working Sector	Higher Education
Patricia	33	Catering Staff	No
Andre	37	Coffee Shop Assistant	No
Roberta	35	Public Transport Engineer	Yes
Cruz	36	Software Manager	Yes
Duarte	34	Financial Assistant	Yes
Andre	24	Coffee Shop Assistant	Yes
Leonardo	23	Coffee Shop Assistant	Yes
Luciano	27	Waiter	Yes
Mauro	32	Shop Assistant	No
Pedro	28	Financial Analyst	Yes
Ana	24	Waitress	Yes
Valeria	27	Coffee Shop Assistant	Yes
Isabela	26	Retail	Yes
Vincente	33	Communication Analyst	Yes
Andriana	25	Retail	Yes
Lucia	29	Graphic Designer	Yes
Guillherme	27	Private Cab Driver	Yes
Francesca	27	Dentist	Yes



